



1960-2010

HONORING OUR PAST ... INSPIRING OUR FUTURE



Built in 1924, the Childs Building at 604 Fifth Avenue (shown here in 1925) was designed by architect William Van Alen, who later designed the Chrysler Building. The Collegiate Church of St. Nicholas is at left; the Goelet residence is visible at right.



In the winter of 1959, three men met for lunch at Childs restaurant at 604 Fifth Avenue in New York City. Once they were seated at their table, they undoubtedly looked over the myriad items on the menu. However, the specialty that day was fundraising—ethical, professional and respected fundraising.



A Childs restaurant (1904) similar to the one on Fifth Avenue.

Bottom: Photo courtesy of the Museum of the City of New York, Byron Collection; Top: Photo courtesy of the Museum of the City of New York, Wurts Bros. Collection.

B

enjamin Sklar of Brandeis University, William R. Simms of the National Urban League and Harry Rosen of the Federation of Jewish Philanthropies had long considered the need for a national association of fundraisers, and their discussions led to the idea of the National Society of Fund Raisers (NSFR). To help launch and lead the organization, the three felt that Dr. Abel A. Hanson of Teacher's College at Columbia University, a fundraising professional and instructor who had written a monograph on fundraising, was the right person for the job ahead.

NSFR was officially chartered by the state of New York on June 21, 1960. At the first annual meeting in New York in February 1961, the society elected a 12-person board of directors, which then elected Dr. Hanson as its first president and established committees on ethics, programs, membership and publicity.

Soon the mission of the organization was defined in its Articles of Incorporation:

- To aid fundraisers in the performance of their professional duties
- To unite those engaged in the profession of fundraising
- To formulate, promote and interpret to organizations, agencies and the public the objectives of fundraising and the role of those who practice it
- To promote and maintain high standards of public service and conduct
- To exchange ideas and experiences and to collect and disseminate information of value to fundraisers and the public
- To encourage and sponsor the granting of awards and fellowships in recognized institutions of learning for study and research in the field of fundraising
- To promote, sponsor and encourage study, research and instruction in the field of fundraising by means of courses in established institutions of learning and by other means

At the meeting held on June 15, 1961, Hanson said of the progress thus far, "We believe this careful planning, directed right now toward the achievement of national representation, will in the long run pay large dividends. It is no small task to establish a national organization. We must build firmly and soundly at the beginning."

Later that year at the meeting on Nov. 15, 1961, held at the Sheraton-Atlantic Hotel in New York, the main speaker was Joseph F. Nee, then senior vice president of the National Foundation-March of Dimes, who spoke about "The Public Image of the Fund Raiser." In his remarks he noted, "The National Society of Fund Raisers can become an excellent vehicle to set standards of fundraising, help train fundraisers, attract top caliber young men and women into the field and launch a public relations program to bring about a proper understanding of the needs and accomplishments of this field."

Undoubtedly Mr. Nee would be very pleased—amazed, actually—at how the association has more than lived up to those expectations.

Jacklyn P. Boice,
editor

NSFR Certificate
of Incorporation,
June 21, 1960



THE HISTORY OF AFP

1959

■ Benjamin Sklar of Brandeis University, William R. Simms of the National Urban League and Harry Rosen of the Federation of Jewish Philanthropies meet in New York to discuss the need for an association of fundraising professionals. They recruit Dr. Abel Hanson, general secretary of Teacher's College at Columbia University, to serve as the organization's first president.



1961

■ NSFR holds its first annual meeting in New York on Feb. 20 and elects a 12-person board of directors. The board elects Dr. Hanson as president and establishes committees on ethics, programs, membership and publicity.

1960

1960

■ The National Society of Fund Raisers (NSFR) is chartered by the state of New York on June 21.



1963

■ Eighty-eight people attend the first NSFR conference, a one-day program held at the Motel on the Mountain in Suffern, N.Y.



1962

■ First quarterly issue of the *NSFR Newsletter* published, with William Simms as editor.
■ NSFR has 197 members and a treasury of US\$1,323.

■ Benjamin Sklar urges the establishment of regional chapters in the larger cities to facilitate and increase membership in NSFR nationally.

1964

■ Jess W. Speidel II is elected president; Dr. Hanson is elected to serve as the first chair of the board.

■ Agreement reached for the Association of Fund Raising Directors (AFRD) to affiliate with NSFR as a chapter in New York City (the first NSFR chapter); effective in July, the affiliation adds 106 members.

1965

■ Barnet M. Deutch chairs a special committee to draft a *Code of Professional Ethics and Standards for the Practice of Fund Raising*, and the code is adopted.

■ The board approves the formation of a legislative committee.

■ Bylaws changed to permit the formation of local chapters.

■ Discussions held with Austin V. McClain, president of Marts and Lundy and chair of the American Association of Fund Raising Counsel's committee on relationships, about AAFRC's financial support of the society.

■ Second chapter established in Washington, D.C., on May 14, when the Fund Raisers Association of the National Capital joins NSFR.

■ Membership reaches 496 in 26 states, including Hawaii.

1960

John F. Kennedy elected president.



1961

U.S. government establishes the Peace Corps.

The Berlin Wall is erected.



1964

Dr. Martin Luther King Jr. receives the Nobel Peace Prize.

1965

Canada's Maple Leaf flag raised for the first time.

UNICEF awarded the Nobel Peace Prize.

1960-2010

PUBLIC POLICY

1969

In the Tax Reform Act of 1969, Congress creates a number of distinctions between public charities and private foundations and also introduces the subclassification private "operating foundation."

1966

■ First NSFR office opens in New York at 10 East 49th Street, staffed by Mrs. Anne Kurzman.

1967

■ "Employment Opportunities and Career Center" established.
■ Chapters in Massachusetts (Boston) and northern Ohio (Cleveland) established.
■ NSFR President Ralph Chamberlain is invited to serve as a consultant to the Ford Foundation on recruitment, placement and training of fundraisers for black educational institutions.

1968

■ Three new chapters added in California (the Southern California Chapter, now the Greater Los Angeles Chapter), Georgia and Texas.

1969

■ Delaware Valley (now Philadelphia) Chapter established.
■ Robert Pierpont chairs the first multiday annual conference, which is held with the Delaware Valley Chapter in Philadelphia.

■ A national office is established in New York, prompting the addition of professional staff.
■ Noel C. Koch from the Delaware Valley Chapter is appointed NSFR's first executive director.

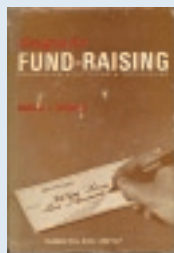


1969

1966

Harold J. Seymour's *Designs for Fund-Raising* published.

Jerry Lewis begins annual Muscular Dystrophy Association telethons, marking the arrival of major media as an effective fundraising technique.



1969

United States lands the first person on the moon.



1969

Community foundations pioneer donor-advised funds to allow philanthropists to give without starting a stand-alone foundation.

THE HISTORY OF AFP



1970

- The Ontario (now Greater Toronto) Chapter established—the first chapter outside the United States.
- Noel Koch resigns.



1973

- Hank Goldstein, president, and Jess Speidel, treasurer, personally guarantee NSFR's debt of US\$3,000.
- Goldstein travels to all chapters (11 at the time), advocating a strong national organization and a dues increase; despite fears, the increase passes and membership grows.
- The NSFR Institute of Continuing Education (NICE), forerunner of the AFP Foundation for Philanthropy, is founded and incorporated as a 501(c)(3) organization, with W. Homer Turner, Ph.D., as the first chair.
- Dr. Abel Hanson dies.

1976

- The "Pantheon of Philanthropy Hall of Fame" (forerunner of the Awards for Philanthropy program) is established by the Delaware Valley Chapter at the Philadelphia annual conference commemorating the Bicentennial.
- Chicago chapter established, with Donald A. Campbell Jr. as the founding president.

1974

- Dues increase from \$20 to \$50.
- A search committee is named to find a paid association executive.



1975

- Byron Welch elected president.

1970

1972

- Work begins to establish a professional certification program.

1971

- The national office moves to 130 East 40th Street.
- The lengthy process of creating a professional association staff continues.
- NSFR receives contributions from AFRD/NSFR, New York Chapter (\$3,000 grant) and from AAFRC (\$1,800 grant in 1969 for the third consecutive year) that help enable the society to realize its goals.

1971

George Harrison and other rock stars perform at Madison Square Garden to raise funds for Bangladesh.



1973

Arab oil embargo.

1974

The Philadelphia Ronald McDonald House (the first of many worldwide) is established with the help of the Philadelphia Eagles football team and Children's Hospital of Philadelphia.

1960-2010

1977

- Fletcher R. Hall, CAE, hired as the first paid president of NSFR.
- The national office moves from New York to Washington, D.C. (The Investment Building, 1511 K Street, N.W., Suite 831), in a 648-square-foot space.



- Organization name changes from National Society of Fund Raisers (NSFR) to National Society of Fund Raising Executives (NSFRE).

- First issue of the NSFRE Journal published.



PUBLIC POLICY

1976

The 1976 Lobbying by Public Charities Act adds sections 501(h) and 4911 to the Internal Revenue Code; the H election sets specific dollar limits on allowable direct and grassroots lobbying expenditures.

1979

- Chapter Presidents Council established, with Barbara Marion as the first president.
- The NSFRE legislative committee issues its first formal advocacy statement supporting the Fisher-Conable bill (H.R. 1785), which would allow a charitable deduction for taxpayers whether or not they itemized their deductions.
- The board meets in September in Guadalajara, Mexico, at the invitation of professional members and representatives of the Mexican government.



1978

- Donald A. Campbell Jr. elected chairman of the board.
- NSFRE division structure established, with committees organized into four areas: professional education, membership services, public affairs and operations.
- Fletcher Hall resigns; James L. Maxwell, who had served many years on the board, becomes executive vice president.



1979

1977

Amnesty International awarded the Nobel Peace Prize.



1979

Egypt's President Anwar Sadat signs a peace treaty with Israel's Prime Minister Begin.



THE HISTORY OF AFP



1980

■ J. Richard Wilson named executive vice president (a title later changed to president).

■ NSFRE establishes first certification program for fundraisers—the Certified Fund Raising Executive (CFRE)—after almost 10 years' effort.

■ Robert Pierpont elected the first chair of the NSFRE certification board.

■ Under the leadership of Sarah Coviello, the “Pantheon of Philanthropy” becomes the Philanthropy Awards program and is expanded to include recognition of an outstanding fundraising professional, outstanding volunteer fundraiser and outstanding philanthropist.

■ Membership reaches nearly 2,000 members in 23 chapters.



1981

■ The CFRE credential is awarded to 166 professionals in the United States and Canada.

■ First annual conference managed by mostly professional staff.

■ Consortium formed by NSFRE, Council for Advancement and Support of Education (CASE), American Association of Fund Raising Counsel (AAFRC), Independent Sector and the United Way.

■ Membership reaches 2,913 in 36 chapters.



1982

■ First international conference held outside the United States at the Royal York hotel in Toronto.



1983

■ Barbara Marion, CFRE, is the first officer elected to the position of chair-elect.

■ First conference for senior fundraising managers held in Princeton, N.J.

■ Board size reduced from nearly 200 to 125 members.

■ Five-year plan developed.

1984

■ Mission of the NSFRE Institute clarified; comprehensive plan developed and a major fund drive launched.

■ The “First Course in Fund Raising” launched in Los Angeles at the annual conference held at the Biltmore Hotel.



1985

■ NSFRE co-hosts the first Capitol Hill Day with the National Association for Hospital Development and Independent Sector.

■ Canadian Society of Fund Raising Executives officially converted from an NSFRE chapter to a separate, independent professional society.

■ The board creates a task force on advanced certification.

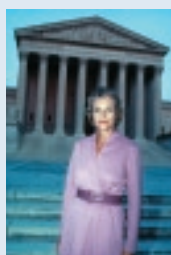
■ Headquarters moves from Washington, D.C., to Alexandria, Va. (1101 King Street), to accommodate staff needs and larger membership, which has reached 5,400 in 70 chapters.

1981

Sandra Day O'Connor is the first woman named to the U.S. Supreme Court.

First space shuttle, *Columbia*, launched.

The IBM personal computer is introduced.



1981

The Statue of Liberty-Ellis Island Foundation pioneers cause-related marketing when it begins to use corporate sponsorships to raise money for restoration of the Statue of Liberty.

1982

Paul Newman begins Newman's Own and gives away all profits from the sale of the products to educational and charitable organizations.



1984

Discovery announced of the virus that causes AIDS.

1960-2010



1986

- First annual National Philanthropy Day® (NPD) held on Nov. 15.
- A Minority Affairs Committee, with Dorothy Darby as chair, is formed to address the participation, advancement and service for minority fundraising professionals.



- Marvin Hamlisch composes *Now, More Than Ever*, the official song of NPD.
- A case statement for an advanced certification program is adopted.

1987

- NSFRE begins a two-year comprehensive strategic planning process to address member needs in various areas.
- With a grant from the Lilly Endowment, a Think Tank on Education brings together 46 premier fundraisers and educators to examine fundraising education for the 1990s.
- NSFRE works with the National Association for Hospital Development (NAHD) and AAFRC to study the feasibility of a joint certification process for fundraisers.

1988

- J. Richard Wilson, president of NSFRE since 1980, dies unexpectedly.
- A Forum on Ethics in Fund Raising held, with representatives from health, education, social services and cultural organizations attending.

1989

- NSFRE President Ian Sturrock, Ph.D., CFRE, dies; Gale Clarke, COO and director of marketing, serves as acting CEO; officers and volunteers help fill staffing gap.
- First Staley-Robeson-Ryan-St. Lawrence research award (now the Skystone Ryan Prize for Research on Philanthropy and Fundraising) given to Bruce Hopkins for his book *The Law of Fund-Raising*.
- First Executive Leadership Institute (ELI) held at Indiana University for senior fundraising executives.
- Upon advice of legal counsel, the board votes to suspend the prohibition against percentage-based fundraising from the code of ethics, angering many members.

PUBLIC POLICY

1980

The U.S. Supreme Court rules that an ordinance requiring fundraising groups to prove that at least 75 percent of funds raised goes for charitable purposes infringes on freedoms protected by the First Amendment (*Village of Schaumburg v. Citizens for a Better Environment*).

PUBLIC POLICY

1981

Tax Reform Act of 1981.

PUBLIC POLICY

1984

In *Maryland v. Munson*, the U.S. Supreme Court rules that states cannot impose limits on the amount of money charities spend on fundraising.

PUBLIC POLICY

1986



NSFRE succeeds in having President Reagan issue a proclamation declaring National Philanthropy Day.

PUBLIC POLICY

1988

In *Riley v. National Federation of the Blind of North Carolina*, the U.S. Supreme Court clarifies and expands First Amendment protection for solicitation by nonprofits and their right to utilize professional fundraisers.

1989

1985

We Are the World, sung by an all-star rock choir, raises \$52 million for African famine relief. Bob Geldof organizes "Live Aid" musical extravaganza, raising \$40 million for international hunger relief.

1986

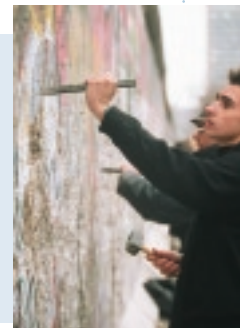
On Jan. 28, space shuttle *Challenger* breaks apart 73 seconds into its flight, killing all seven crew members.



1987

Ted Turner makes US\$1 billion gift to the United Nations.

The Dow Jones Industrial Average falls a record 508 points, closing at 1,738.74.



1989

The Berlin Wall comes down.

THE HISTORY OF AFP



1991

- Patricia F. Lewis, CFRE, named president and CEO.
- Board size reduced to 35 members.
- NSFRE foundation starts its Omega Circle program.
- National Assembly (later named Delegate Assembly) created, with proportional representation based on chapter size.
- *Revised Code of Ethical Principles* adopted in November; the prohibition against percentage-based compensation for fundraising codified.

1990

- Board Restructure Task Force created to reorganize the society's governing structure.
- Research Council formed.

1992

- The Advanced Certified Fundraising Executive (ACFRE) credential established.
- *Standards of Professional Practice* adopted.
- Robert Pierpont chairs the ethics committee and develops enforcement procedures.
- Chair Charles R. Stephens, CFRE; Treasurer William Moran, FAHP; and President and CEO Pat Lewis testify before the House Ways and Means Committee, the Internal Revenue Service (IRS) and the Financial Accounting Standards Board on proposed legislation affecting philanthropy and fundraising.



- Charles Stephens gets approval to publish a dictionary of fundraising terms, with Barbara R. Levy, CFRE, leading the project as editor.

- Membership reaches 13,813 in 125 chapters.



1993

- NSFRE, the Association for Healthcare Philanthropy (AHP), the Council for Advancement and Support of Education (CASE) and AAFRC (now the Giving Institute) develop and adopt *A Donor Bill of Rights*.

- Ethics guidelines and enforcement procedures adopted.
- Five-year strategic plan developed.
- First ACFRE credentials conferred.



- *NSFRE Journal* revised and renamed *Advancing Philanthropy*.

- The Mexico (now Mexico City) Chapter established.

1994

- Youth in Philanthropy (YIP) program begins.
- Publishing program with John Wiley & Sons established.

1991

- First site opened on the World Wide Web.

1992

- The Fidelity Charitable Gift Fund is founded to allow people to make deductible contributions into donor-advised funds hosted by the mutual fund company.



1994

- The Hubble telescope proves Einstein's theory of black holes.

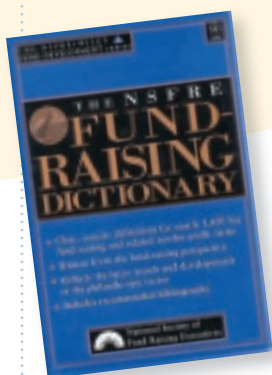
1960-2010

1995

■ Barbara R. Levy, ACFRE, serves as the first chair of the ACFRE board.
■ First Research Think Tank held.

1996

■ NSFRE and AHP agree to merge their respective certification programs into the CFRE Professional Certification Board, with other philanthropic organizations joining in support of the independent credential for the fundraising profession.



■ *The NSFRE Fund-Raising Dictionary* is published.

1997

■ Patricia Lewis announces that she will resign as president and CEO in 1998.
■ Membership reaches 18,000 in 149 chapters.
■ Nominating committee renamed the Committee on Directorship, with expanded responsibilities, including evaluating board performance.



1998

■ Paulette V. Maehara, CFRE, CAE, named president and CEO on July 1.
■ Executive Management Institute held (Vanderbilt University).

1999



■ United States "Giving & Sharing" postage stamp honoring philanthropy issued on Oct. 7, after a 27-year campaign by Milton Murray.

1999

■ NSFRE Foundation for Philanthropy-Canada created to further serve the needs of members in Canada.
■ Membership surpasses 22,000 in 157 chapters.
■ NSFRE's international conference attracts more than 4,000 attendees.
■ More than 100 chapters participate in National Philanthropy Day.

1997

Venture philanthropy, a philanthropic approach based on successful venture capital practices, is popularized by the *Harvard Business Review* article "Virtuous Capital: What Foundations Can Learn From Venture Capitalists" by Christine Letts, William Ryan and Allen Grossman.



1998

In the late 1990s, giving circles emerge on the heels of the investment clubs of the 1990s.

1999

Interactive sites ("e-philanthropy") begin to emerge in significant numbers with organizations such as Charitableway.com and ImpactOnline.

THE HISTORY OF AFP

2000

- First board of the Foundation for Philanthropy–Canada established, with Andrea McManus, CFRE, as chair.
- First Faculty Training Academy (FTA) held.
- First Audioconference offered.

PUBLIC POLICY

2002

The Sarbanes-Oxley Act of 2002 is designed to strengthen corporate accountability, oversight and disclosure standards; sections concerning whistleblower protection and the destruction of documents affect nonprofits.

PUBLIC POLICY

2003

Policy statement CPS-022 of the Canada Customs and Revenue Agency (CCRA) includes information for registered charities on political activities (including advocacy) and allowable limits under the Income Tax Act.

The U.S. Federal Trade Commission (FTC) opens the National Do Not Call Registry in order to comply with the Do Not Call Implementation Act of 2003.



2001

- Name officially changes from National Society of Fund Raising Executives to Association of Fundraising Professionals (AFP) to reflect the organization's expanded international scope.

- CFRE International established as an independent entity for certifying fundraisers worldwide; a growing number of professional associations sign on.
- Online First Course developed.



2002

- Memorandum of agreement signed to make the AFP (formerly NSFRE) Foundation for Philanthropy a separate, self-supporting organization.
- The board approves the formation of a U.S. Political Action Committee (PAC).
- First *Ready Reference* guide published.

2003

- First International Fundraising Summit takes place in Toronto, with 23 participants representing 19 countries.
- First Hemispheric Congress–Latin America organized by AFP and held in Mexico City.



- The AFP China, Hong Kong Chapter established.



- The new online *AFP Fundraising Dictionary*, with Barbara R. Levy, ACFRE, as editor, is launched.
- Second International Fundraising Summit held at the Resource Alliance IFC Conference in The Netherlands.

2001

International Year of Volunteers.

Hijacked planes crash into the World Trade Center and the Pentagon on Sept. 11; after the attacks, charities raise more than \$2.2 billion.



2002

The euro currency debuts in 12 European countries.

2003

Space shuttle *Columbia* explodes, killing all seven astronauts aboard.

2004

Indian Ocean earthquake and resulting Asian tsunami kill nearly 230,000 people in 13 countries; U.S. charities collect nearly \$1.3 billion for the victims.

1960-2010



2004

- AFP U.S. Political Action Committee (PAC) established, strengthening AFP's voice in government policy.
- Online CFRE Review Course developed.
- AFP Curriculum Framework developed.
- First AFP Faculty Training Academy (FTA) held in Canada (in cooperation with the Mount Royal College Institute of Nonprofit Studies in Calgary, Alberta).
- Third International Fundraising Summit held in The Netherlands.

2005

- Expanded strategic planning process linking programs to goals established.
- First collegiate chapters chartered (in Arizona and Indiana).
- First North American Diversity Summit held in conjunction with the international conference in Baltimore.
- Essentials of Fundraising program launched.
- AFP participates in the deliberations of the Oversight and Self-Regulation Work Group of the recently created ad hoc Panel on the Nonprofit Sector in response to a request from the U.S. Senate Finance Committee.
- AFP's first Advocacy Day in Canada encourages members of Parliament to support government recognition of National Philanthropy Day.

- The AFP Singapore Chapter and AFP Indonesia, Jakarta Chapter are established.



2005

Hurricane Katrina hits the U.S. Gulf Coast; charities raise \$1.06 billion to help the survivors.



2006

- AFP governance structure revised, with a worldwide geographic district structure established.
- Fourth International Fundraising Summit held in The Netherlands; 24 countries ratify the *International Statement of Ethical Principles in Fundraising*.
- Fundraising Effectiveness Project (FEP) begins, in collaboration with donor software providers.

PUBLIC POLICY

2004

The Canadian federal Personal Information Protection and Electronic Documents (PIPED) Act goes into effect.

The Canadian Radio-television and Telecommunications Commission (CRTC) issues new regulations that impose additional requirements and disclosures for charities engaged in telemarketing, as well as for any for-profit organizations working on behalf of a charity.

The IRS begins accepting Forms 990, 990EZ and 1120POL electronically.

PUBLIC POLICY

2005

President Bush signs into law new charitable giving provisions as part of a Hurricane Katrina tax package designed to encourage giving to all types of charities.

PUBLIC POLICY

2006

The 2006 Canada federal budget includes a provision to eliminate the capital gains tax on gifts of appreciated securities to charities. The budget also applies the same provision (eliminating the capital gains tax) to the Ecogift program, through which Canadian landowners may donate ecologically sensitive land (or easements and covenants) to conservation charities to ensure its preservation in perpetuity.

President Bush signs into law a pension reform bill that includes several giving incentives, including the IRA Rollover provision.

2006



2006

Warren Buffett announces that he will donate 85 percent of his \$44 billion fortune to five philanthropic organizations, with about \$31 billion going to the Gates Foundation.



THE HISTORY OF AFP 1960-2010

2007

■ Current code of ethics is amended to the *AFP Code of Ethical Principles and Standards* to reflect the new business member category.

■ Susan Mullin, CFRE, chair of AFP's Canadian Government Relations Committee, represents AFP during a dinner roundtable with Finance Minister James Flaherty.



■ First International Congress for Fundraising for Schools and Universities held in September in São Paulo, Brazil.

■ AFP's IRA Rollover Call-In Day urges Congress to make the IRA Rollover permanent and enhance the provision by removing some restrictions.

■ First Chapter Leadership Academy (replacing the Delegate Assembly) held.

■ Partnership established with Tecnológico de Monterrey in Mexico to develop a fundraising basics course, which is part of Tec's Social Leaders program.

■ First Nonprofit Management Institute held (Stanford University).

■ Higher Education Task Force created.

■ Headquarters moves to Arlington, Va. (4300 Wilson Blvd., Suite 300).

2008

■ The fifth International Fundraising Summit held in San Diego, with representatives from fundraising organizations in 12 countries attending.

2008

U.S. financial markets are roiled by turmoil, with stock markets plunging worldwide.



2007

Philanthropist Brooke Astor dies; her life's motto sums up her generosity: "Money is like manure; it's not worth a thing unless it's spread around."



2009

■ Membership surpasses 30,000 in 207 chapters.

■ The revised AFP CFRE Review Course is organized around the domains of the CFRE examination rather than specific fundraising strategies.

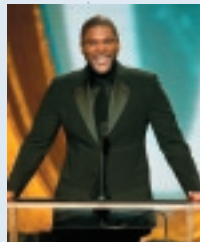


■ First Color of Money conference focusing on diversity is held in Philadelphia.

2010

■ The new AFP Fundamentals in Fundraising is available to chapters; composed of seven modules, the course was developed with a foundation from the Essentials of Fundraising program and the First Course.

■ With an official launch slated for January 2011, a new professional qualification in fundraising (developed in partnership with the Center on Philanthropy at Indiana University) will be the first academically rigorous qualification to be offered to the profession.



2009

Filmmaker Tyler Perry donates \$1 million to the NAACP, the largest gift from an individual to the civil rights organization.

2010

A 7.0-magnitude earthquake devastates Port-au-Prince, Haiti, prompting more donations—with large sums raised online and through text messages—than many aid groups said they had seen since Hurricane Katrina and the Asian tsunamis.

PUBLIC POLICY

2007

The IRS releases the redesigned Form 990, which includes the largest set of revisions and reforms since the form was created in 1941; charities will use the revised form in 2009 for tax year 2008.

The IRS begins requiring small charities (annual gross receipts of \$25,000 or less) to submit an annual electronic notice, Form 990-N.

PUBLIC POLICY

2008

The CRTC rules that all organizations carrying out telemarketing activities (including registered charities and other exempt organizations) must register with the new national DNCL (Do Not Call List).

PUBLIC POLICY

2009

In his FY10 budget, President Obama proposes limiting itemized deductions for individuals earning more than \$200,000 (and couples/families earning more than \$250,000) at a 28 percent rate beginning in 2011.

The Canada Revenue Agency (CRA) releases a revised and final version of its Policy on Fundraising.

The Minister of Canadian Heritage officially declares Nov. 15, 2009, as National Philanthropy Day in Canada.

W

hen recalling those initial meetings about the need for a national organization for fundraising professionals, William R. Simms noted, “We did not look forward too far—we were more interested in getting it started.

We knew it would move, but we didn’t know how. We wanted an organization for the field itself, for philanthropy and for the general public. We certainly didn’t dream as big as it happened—that the organization would be what it is today. It moved ahead on its own. ... It came out of nowhere and became one of the biggest things of my life.”

Indeed, not only has the organization grown in physical size, but it also has enabled the development of a chosen career—fostered by ethical practices, education and dedicated mentors—about which fundraisers can say, “the professional I am proud to be today.”

The next time you are in New York City and happen to be near Rockefeller Center, stop by a clearly visible blue building at 604 Fifth Avenue. It is a TGI Friday’s restaurant. Fifty-one years ago, three men stopped by the same building to have lunch together in another restaurant, and the results of

their discussions during that meal are still affecting philanthropy and the fundraising profession today—and undoubtedly will do so for many years to come.



William R. (Bill) Simms

TGI Friday’s restaurant now occupies the Childs Building. Childs restaurant remained into the 1960s; when the church on 48th Street was replaced by an office building in 1950, the glass at the corner was replaced with glass block.



AFP 50th Anniversary SCRAPBOOK

In September of 1958, I enrolled in Teachers College, Columbia University as a candidate for the Doctor of Education degree, specializing in the administration of colleges and universities. For my second year of study (1959–1960), I learned that the college was offering two courses titled “Educational Promotion and Fundraising: Basic and Advanced” for three credits each. As far as I know, these were the first courses ever offered in fundraising for credit at an American educational institution.

I joined NSFR in 1960 as a student member (arranged by Dr. Hanson) and attended the early meetings in New York.

The subject matter intrigued me, so I signed up for both courses. They were taught by Dr. Abel Hanson, who was the secretary of the college and responsible for alumni relations, communications and fundraising. These courses were taught in seminar/tutorial style because less than 10 students were enrolled. Fundraising at that time was not considered by many as a legitimate field of study, and Dr. Hanson was not considered a member of the faculty. However, he had obtained approval from the academic dean or committee to sanction the courses for credit.

While participating in Dr. Hanson’s courses, he approached me one day and said that he had convinced member firms of the American Association of Fund Raising Counsel (AAFRC) to provide Teachers College with two fellowships for doctoral candidates interested in the field of fundraising as a career.



Dr. Abel A. Hanson

He asked me if I would be interested in applying for one. Since the fellowships were \$1,500 each and I was a financially challenged graduate student, I jumped at the opportunity. Another student by the name of Rick Timlin and I were the first two to

receive the fellowships. The focus of our doctoral projects was on fundraising, and Dr. Hanson was our adviser.

During my final year at Teachers College (1960–1961), Dr. Hanson told me that he had been meeting with a number of chief development officers and principals at campaign consulting firms about forming a new professional association that was inclusive of all types of nonprofits engaged in fundraising. While I remember most of the original organizers were identified with education, they wanted the new organization to include health, human services, religion and the arts. They called the organization the National Society of Fund Raisers (NSFR).

I joined NSFR in 1960 as a student member (arranged by Dr. Hanson) and attended the early meetings in New York. It was impressive to observe how fast the organization grew as I embarked on a career in fundraising after Teachers College.

Several years later I received news of Dr. Hanson's death. While I was greatly saddened, there were wonderful memories of my first mentor in fundraising. He was a quiet, unassuming, persistent and well-organized man who prided himself on his wordsmithing. He was a dedicated professional and passionate about his work. He was a wonderful human being and a founder of NSFR/AFP.

David C. Ferner

A charter member of NSFR, David C. Ferner was managing partner of Currie, Ferner, Scarpetta & DeVries in Minneapolis; president of Frantzreb, Pray, Ferner & Thompson in Arlington, Va.; and vice president of Frantzreb & Pray Associates in New York. In between two consulting careers, he was vice president for development of the Minnesota Orchestral Association. Early in his career, he was director of development of Sarah Lawrence College. He was a board member of the AFP Minnesota Chapter and participated in numerous training programs in Minnesota and throughout the country. He resides in Destin, Fla., and continues to consult.

While I am one of those who readily recognizes and respects the organization for what it has done for leadership, training and education in the field of philanthropy, I have been on the sidelines and, at best, a quiet cheerleader.

In the early 1960s I was executive vice president (the title at that time for most association chief staff persons) for the American College Public Relations Association (ACPRA) in Washington, D.C., Abel Hanson, general secretary of Teachers College, was a personal friend and active in ACPRA. He talked with me on several occasions about what he and others were involved in, as his New York group of fundraisers was considering establishing a national organization. As you know, it ultimately became the NSFR and, as the cliché goes, the rest is history. Abel felt that there was no organization serving the emerging field of fundraising outside of education where he thought ACPRA and our sister outfit, the American Alumni Council (AAC), were meeting the needs. We provided our legal articles of organization and bylaws, and history and evolution of ACPRA from a small, strictly volunteer committee of university news bureau editors established in Chicago on the same day that America declared war on Germany in 1917.

That essentially is my modest contribution to what has now become AFP. I know that Abel and his band of New York fundraisers would be very proud of how their creation has evolved. Their eyes would certainly glaze over at its size and scope. While at ACPRA, my dream and focus was to join our organization with the AAC, which was accomplished in 1975 when the Council for the Advancement and Support of Education (CASE) was established.

Since then (until a few years ago) I have remained active in the field and was a modest but proud helper in the founding and growth of The Center on Philanthropy at Indiana University.

John Leslie

John Leslie was head of ACPRA when it celebrated its 50th anniversary in 1967. He lives in Potomac, Md.

consider myself blessed in so many ways, not the least of which is to have been immersed for almost 47 years in the noble profession of philanthropy.

The year was 1963, and I was finishing my graduate degree in philosophy. Villanova University had just entered the field of development and Fr. Bill Farrell, vice president (my former dean of students), invited me to lunch and asked if I would like to come to work in development. I told him I had no interest in photography. He had a good laugh and then proceeded to tell me about development. A few days later I met John Burns, Villanova's director of development and a person, some 15 years my senior, who would have a great impact in my career and my life.

I learned later that John was one of the rare development professionals who had actual fundraising experience, having been with the Red Cross before coming to Villanova. Prior to that, like so many in the field of development, John came from a totally different background. An MFA graduate from Catholic University, he had been a Shakespearian actor. The more he explained development, the more I knew this was to be my life's work. It wasn't just what he said; it was the passion with which he said it.

Vision, dedication, commitment, a strong faith (in God and in the goodness of the human spirit), sound values, interest in others, articulate, humorous—John's passion to serve others made him one of the most gifted leaders I had met. And, he was so interested in what I had to offer. I had spent time in Italy and was fluent in both the language and the culture. I had also been a very active student at Villanova, knew many people on campus and enjoyed introducing my boss to many of my friends.

As I began to meet the few development professionals at the time, mostly from Penn, Temple, LaSalle and St. Joseph's (Philadelphia's famous Big Five), I soon realized how much these men (there were few women in the field back in 1963) had in common. Professional and dedicated, they all wanted to best serve their institutions and would do anything to become better practitioners of this newly emerging field. I was the "kid" in the group and they all enjoyed teaching and helping me.

NSFR was a wonderful association for us. When I joined there were fewer than 200 members. We gathered monthly for lunch, a formal presentation and some business. NSFR served many important areas; mostly, it validated us as professionals in a field known to few. How that would change! It also gave us opportunities and resources to learn from one another and support one another.

When a new program I developed received national honors

by ACPRA and AAC, precursors to CASE, it was as though all of us had been honored. They were all so proud. There existed a wonderful spirit of camaraderie in our profession. I was asked to speak at many of their colleges and universities that, with their advocacy and recommendations, eventually had a hand in establishing many development programs for colleges, universities, dioceses and other nonprofits.

It was an exciting time! Somehow we sensed that we were pioneers in a profession that would literally alter the philanthropic landscape of the United States and the world. In 1960, Americans contributed \$1 billion; today, we exceed \$300 billion. But it isn't only about raising money. I never liked the term "fundraiser" and petitioned NSFR for years to change the term to "philanthropic professionals." Most of us do what we do because we are mission driven—we are called to help create a better world through bringing people together with dreams. We love people and are best led by serving others.

One of the most rewarding aspects of the field is that we meet and collaborate with some of the finest people from all walks of life. To this day I continue to listen and learn from professionals, volunteers and donors alike. They have so much to share; we have so much to learn. This field, and those called to serve, has only scratched the surface of its potential. May we always be students and servants.

One of the first times I attended a NSFR luncheon in Philadelphia, the speaker (normally one of our own members) held me spellbound as he shared with great facility some insights into the field of philanthropic development. I can remember wishing I had a tape recorder. When he finished, the moderator thanked him and asked if he could capture in a few words the essence of what he had just shared. He stopped, thought and uttered a phrase I have since used hundreds of times to explain to professionals and volunteers alike the need to be patient in cultivating support—both individual and institutional:

"Shake and shake the catsup bottle,
Some'll come, and then a lot'll."

Peter G. Federico

Peter G. Federico, president of Federico & Cummings in West Chester, Pa., joined NSFR in 1963 and became a member of the Delaware Valley (now Philadelphia) Chapter. Toward the end of the 1960s, he served one term on the board after serving on a nominating committee. He also served on a committee looking at splitting off new regions. He assisted in organizing the Brandywine Chapter (with Kevin Sullivan) and the Allentown Chapter (with Lona Farr).

*A few days later I met
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It is hard to believe, but my firm was the first woman-headed consulting company to be admitted into membership in the American Association of Fund Raising Counsel (AAFRC, today The Giving Institute). Remember, we are talking 32 years ago! I want to share a few reflections on what the first committee meetings and board meeting were like for me.

First, a comment on the "guys." Most were old enough to be my father, and as a group they were extremely courteous, old-worldly and very smart. So what were they going to do with this thirty-two-year-old WOMAN? The only woman who had ever attended their meetings was the office assistant, Marie Medeo. They truly loved Marie, but she was everyone's vision of the perfect assistant. I, however, was another kettle of fish. I was running my own company and succeeding at providing services that none of them had ever thought about offering.

So there I was, about to deal with 30-odd father figures, and they were confronted with this anomaly. I did what every red-blooded woman knows is her best shot: As I met each of them ... I kissed them! Maury Gurin talked about my tactic until the day he died.

The committee meetings were a bit tough to handle, as little real work was getting done—unless Marie did it. I sloughed through and managed to end the day with my own committee assignment. What a surprise.

But the board meeting was almost my undoing. The meetings were held in Pittsburgh, where Ketchum was headquartered. They had arranged for the board meeting to be at the Duquesne Club. Terrific—except everyone forgot about the WOMAN and the club did not allow women. So the Queen of Fundraising went to her first board meeting via the freight elevator and all of the guys smoked cigars at 9 a.m.—great fun.

Well, I survived them and they survived me. AAFRC went on to admit other non-traditional companies and even another WOMAN or two. We all made terrific contributions and very importantly supported the development and growth of AFP

I started my advancement career in 1953 as director of public relations at Saint Louis University, and over the next 43 years served as chief development officer for John Carroll University, University Hospitals of Cleveland, the Dartmouth Hitchcock Medical Center and, finally, Northwestern Memorial Hospital in Chicago, retiring in 1996.

Much has changed over those many years. Back in the 1950s we were pretty much making things up as we went along, with annual funds and occasional capital campaigns. But under the influence of veteran professionals such as Tom Gonser, a mentor of mine, we gradually moved toward ongoing development programs guided by strategic planning coordinated with institutional management. This sophisticated approach, coupled with the enormous explosion in American wealth over the past half century, produced undreamed of results at all levels—up to billion-dollar programs and the astonishing expansion of American higher education and the number of nonprofits generally.

Another important change over these many years has been the increase in the number of women in the development field. There were few, if any, women in the top jobs when I started and for quite a few years after that, but now they are widely and rightly accepted as colleagues and equals.

It has been a great career and a great life.

William Fissinger

William Fissinger lives in Hudson, Ohio. Among his many activities with the society, he helped establish the Northern Ohio (Cleveland) Chapter.

A few vignettes:

- The night when Blair Schryer and George Brakeley Jr. had a contest to see who could tie a bow tie the fastest—both dapper gentlemen!
- Periodic dinners with the one-of-a-kind Maury Gurin ... with Jimmy Alford soliciting Maury for a gift to his own endowment at the AAFRC. Both Jimmy and I wound up making larger-than-anticipated gifts ourselves! You can guess why.
- Working with the inestimable Jack Schwartz. He was amazing and tireless in his dedication to the association and AFP.
- Bob Thompson of Ketchum and I wearing Brakeley T-shirts for the camera.
- The brilliant Chuck Lawson—enough said.

Jane C. Geever

Jane C. Geever, chairman of J. C. Geever Inc. in New York City, joined NSFR in 1970. She served on the foundation board in 1985–1987.

As I enter the twilight zone of old age, I think of the countless trillions I have manipulated into the right hands as a fundraising professional. (We cannot cite millions and billions anymore, by official government edict!) Regardless, the dollars don't mean squat in retrospect. If fundraising is just about dollars for you, or even for a good cause, you're in the wrong profession. I've served virtually every kind of cause, large and small, but my most tender and passionate association is with The Salvation Army.

I used to don the uniform and march down the street to conduct curbside services where we brought whores and winos back to the citadel for "soup, soap and salvation." I played at the famous Christmas kettles all over the country for many decades.

Starting in 1970 I found myself playing by the red pot at the North Station in Boston, five days a week from Thanksgiving on, early

mornings and late afternoons for six years. Twice daily for those six years, a gentleman wearing a very long black overcoat and a mouton fur cap and carrying an old-fashioned briefcase sauntered up to the pot with a huge grin on his face. He always put in a buck. If he had time to make a special request for us to play, he sprang for a five-spot! Other than many "Thank you, and God bless you!" greetings, the mystery gentleman and I hardly spoke.

Now, in those days I was a little bit of a hippie, complete with long hair and a full beard. This sort of went with the high-collared 19th-century uniforms we wore.

I left Boston to become director of development for The Salvation Army headquarters in Detroit. I swapped my uniform for Brooks Brothers, ditched the beard and long hair and discovered the need for a Michigan Chapter of the National Society of Fund Raisers. I



Herbert G. Howard, CFRE

On Aug. 1, 1956, I went to work for Lee Tracy, executive director of the Community Chest in Paterson, N.J. About a dozen struggling charities hung by their deficits. Our campaign goal was \$200,000. The in-the-office campaign slogan was "Help support a sagging chest!"

I hired on as public relations director, a title invented by Lee to elevate my self-esteem and keep me working cheap. The salary was \$75 a week, \$10 more than I had been offered as a general assignment reporter for the *Paterson Evening News*.

Lee was one of the two best people for whom I've ever worked (the other was Harold Oram, of course). Here is some of what happened to me during my first campaign.

The pastor of the Dutch Reformed Church of Prospect Heights kicked me out of his office when I told him the Bible didn't mention the Dutch Reformed Church of Prospect Heights. I offered this observation only after he told me the Bible mentioned neither the Community Chest nor township campaigns.

Two large, round, tattooed gentlemen escorted me from a steel extrusion plant on the edge of town. I erred in believing that workplace solicitation for the Community Chest was a movement whose time had come.

We had report meetings. Over at the Alexander Hamilton hotel, volunteer solicitors gathered at breaking light. Following God's blessings, watery scrambled eggs with little pieces of bacon floating in them, pastry of uncertain manufacture and tepid coffee, these worthies told in tones of abject defeat the result of their failed entreaties to the merchants and counting houses of the city. It was a heady start on the day.

Lee had me write my first direct-marketing piece, an earnest plea to the shoe stores, dry cleaners, butchers, hardware purveyors, barbers, pizza parlors, tarot readers, pool halls, bodegas, saloons and other tenders of Paterson's commercial life. For inspiration, I repaired to the Tree Tavern, where warmed by wine and bloated by pasta, I wrote my heart out.

In the fullness of time, Alexander Hamilton left Paterson. Allen Ginsberg left Paterson. And so did I.

My next stop was nearly nine years at the Greater New York Fund, now United Way of Tristate, where I learned how to work effectively with CEOs of big companies and how important good tradecraft was and is. I was well trained as a fundraiser and mid-level manager. I was promoted twice and I had a shot at a top job either in New York or elsewhere within the United Way movement. I don't see a lot of good tradecraft or training today, despite the proliferation of workshops, degrees, conferences and what not. PowerPoint has dulled the senses, and almost no one can

write a simple declarative sentence. The volunteers with whom I worked at the Fund were mostly terrific.

In those days, I dressed for success and was quite a picture. The rule was to mimic the titans of trade: white button-down shirts, dark pinstripes, rep four-in-hands, black wingtips, fedoras and yes, by God, garters to hold up the black socks! It was so perfect, it was almost a send-up of the IBM look. The women wore dresses or skirts, and not those genderless dress-for-success suits that came along later. A woman who showed up in pants would have been sent home—after she'd been fired.

In late 1963, I had just turned 30. My daughter, Janet, had

Their gift to me was and is intellect, passion and leadership—the ability to see things before others do and to act accordingly. And I absorbed the simple truth of the old Romany proverb: "Sometimes you get the bear. Sometimes the bear gets you."

started gathering folks who were interested and I went off to the national conference in Washington D.C. It was HUGE—at least a couple hundred people!

At that meeting the new name was adopted to include the word “Executives,” to which a good number of us objected but were voted down by the wannabes. I challenged the new national chair, Don Campbell, to come to our first chapter meeting in July. He had said that establishing a new chapter in such a short time couldn’t be done, but we did! He had to eat crow while we 40 dined on filet mignon at the Michigan Inn!

During the Washington, D.C., conference, I was riding a very crowded elevator and felt uncomfortable about the way one fellow was staring at me. He suddenly blurted out, shocking everyone on the elevator by his breach of the “elevator silence code”: “You’re that Salvation Army guy from the North Station!” It was the mystery man with the black overcoat!

As it turned out, Herb Howard was attending the NSFRE conference as well. Herb was one of the rocks upon which NSFR was founded nationally, a sage and gentle man. We became friends for life, sharing a great deal over the ensuing

decades, both professionally on the national board and personally.

A few years later Herb called to ask me to write a piece of music for him incorporating *The Easter Hymn*, which I did for classical string quartet. You see, Herb confessed to be dying of mad cow disease, an incredibly painful and terrifying affliction. Herb exhibited no fear and told me that he had willed his body to scientific study so that others could be spared such horrors.

I don’t have a clue how much money was raised under Herb’s guidance, or even under my own. What does it matter? I just know that it was the profession of fundraising that brought us together and granted me the great treasure of a truly heroic friend. Death, where is thy sting?

Robert Getz

Robert Getz, principal of The Getz Development Group in Newaygo, Mich., joined NSFRE in 1977. He was the founder and longest-serving president of the then Michigan Chapter. He served on the society’s board for more than 12 years, as well as the certification committee and the test writing committee. In addition, he created materials for the certification course in the area of planned giving.

only weeks before presented herself to the planet, and I had \$100 in the bank. I answered a blind ad in *The New York Times*. Eve Bates, one of Oram’s vice presidents, had run it. What luck! I had heard a lot about the Oram firm and the clients it served. I showed up at the appointed hour, all kitted out in the IBM rig, and was shortly conducted into the commanding presence of Harold Leonard Oram (HLO). He offered me an 11a.m. cigar and a Dewars (I accepted both) and, after a nice bit of patter, sent me away, having asked for a writing sample.

Later on, HLO called back and said he wanted me to work on a campaign for Hampton Institute (now University), then and now one of the nation’s preeminent historically black institutions, and the first of 14 HBCUs I have since served.

Harold Oram had come into this business as a publicist/fundraiser for the Lincoln Brigade, the American leftists, liberals and idealists who fought on the anti-Franco side in the Spanish Civil War. It was the middle of the Great Depression, a time of one-cent candy, two-cent newspapers and three-cent stamps. When I went to work for his company, Harold had already carved out a brilliant career as an advocate and money raiser for unpopular, often vanguard causes and activists of every kind. When I washed up on the Oram beach, I knew immediately this was where I belonged. I knew this was the work I wanted to do, and that is still true every day of every week.

Harold Oram’s world vision was coherent and purposeful. He was a political and social democrat, a one-worlder, and his true agenda was to make the globe a better place. That became my goal too—and still is. Clients were taken or turned away on that basis. Raising money was only a means.

He revered the written word and the compelling idea dramatically put. He expected felicity of expression in my and others’ writing. He was the best copywriter I ever knew. A compulsive editor, reviser and re-arranger, he rubbed copy raw until he got

what he wanted. He was tough on the copy, but never on the writer. So naturally I’d go back to my shared cubicle, with broken desk and sprung typewriter, composing well into the night, hoping for his praise in the morning.

I moved up in the firm and was given stock. Though I loved the madcap environment, I pushed us to become a business because I realized we could not survive otherwise. We went corporate in the 1970s as the staff grew. In 1978, I bought the business.

With Harold’s death in 1990, I was quite truly on my own. Working for Lee Tracy and the Greater New York Fund, I learned fundraising. Working for Harold, I gradually learned consulting, basically by making many—and correcting some—mistakes. Their gift to me was and is intellect, passion and leadership—the ability to see things before others do and to act accordingly. And I absorbed the simple truth of the old Romany proverb: “Sometimes you get the bear. Sometimes the bear gets you.”

Hank Goldstein

Henry (Hank) Goldstein, CFRE, is principal of The Oram Group Inc. in New York City. He joined NSFR in 1960 and served as the president of the New York Chapter. When he became chair of NSFR in 1973, the organization had a debt of \$3,000. To ensure the society’s solvency, he co-signed a note with Jess W. Speidel II, treasurer, to personally guarantee the society’s debt. He served as president of the NSFR foundation in 1974–1975 and also chaired the ethics committee and served on a strategic planning committee. In 1986 he received the Outstanding Fund Raising Executive award, and at the 2006 Delegate Assembly he received the AFP Founders Medallion, which is given to an individual for extraordinary leadership and contributions to the association. In 2010, he will receive the Chair’s Award for Outstanding Service for his exceptional contributions to AFP, the fundraising profession and the philanthropic community.

With more than 40 years in the field of fundraising, I've had the privilege to be part of a unique profession. It has opened doors and provided opportunities to work with individuals and organizations that have helped change communities and the world. The memories and stories seem both endless and timeless. The question is, where to begin? I've always enjoyed one experience because it underscores the sometimes quirky and often unpredictable nature of our work.

Many years ago, as a young development professional with a well-known nonprofit, one of my responsibilities was to manage its direct-mail program. Having been taught that every gift is important and often sets the stage for a larger gift in the future, I made certain that each donor received some form of a personalized thank-you letter.

One day I spotted a check for \$5 from a first-time donor. It wasn't the amount that caught my eye, but rather who it was from. The check showed "The Owl, Owl Mansion, Hollywood, CA" and was signed by "The Owl." (The address was also shown on the check.)

My first thought was "Only in Hollywood!" Nonetheless, I immediately had a personalized letter of appreciation prepared and addressed using the salutation "Dear Mr. Owl."

Within a few days I received an envelope from "The Owl, Owl Mansion, Hollywood, CA." Upon opening it, I found the very letter I had sent, but with the following scrawled across the salutation I had used: "My name is The Owl, not Mr. Owl."

Curiosity got the best of me. That weekend found my wife and me driving along a narrow twisting road in the Hollywood Hills looking for "Owl Mansion." Before long, we spotted an old MG parked in front of a hillside home. We knew we had arrived at our destination because the personalized license plate on the MG read "The Owl." We saw a well-used

teabag hanging from the rearview mirror. The clincher was the large sign that read "Owl Mansion" above the gate to the property. (Again I thought, "Only in Hollywood!") Should I go to the door to personally thank "The Owl" for his gift and apologize for not getting his name correct in my letter? I decided it would be better to send a letter to apologize for the error in his name and pledge to not repeat the mistake again. The letter went out first thing Monday morning.

Within a matter of days, I received another envelope from "The Owl, Owl Mansion, Hollywood, CA," in which there was a note signed by "The Owl" thanking me for being so thoughtful in showing concern. Also enclosed was another check—for \$5!

A few years later, on Aug. 24, 1976, I saw an article on page A-3 of the *Los Angeles Times* ("Ladies in Black Visit Tomb of Valentino"). It featured the 50th anniversary of Rudolph Valentino's death and the hundreds of fans who visited his crypt. (Only in Hollywood.) In the center of the article was a photograph of a man dressed in Arabian attire. The caption identified the man as someone who visited the crypt on the anniversary of Valentino's death, and it went on to say the he would identify himself only as "The Owl."



"This guy showed up in 1976 on the 50th anniversary of Valentino's death. He called himself 'The Owl.'"

Paul A. Netzel

Paul A. Netzel, CFRE, is founder and chairman of Netzel Grigsby Associates Inc. in Los Angeles. He joined NSFR in 1968 and became a CFRE in 1981 (among the first to take the initial exam). He served on the society's board of directors in 1989-1991 and in 1994. That year he was vice chair and helped manage the membership restructuring process. He served as chair of the national board restructuring implementation task force in 1990-1991, as well as on numerous committees. He also has been very active in the Greater Los Angeles chapter and in continuing education programs, including co-founder of the UCLA Extension, Certificate Program in Fund Raising (1991) and as an instructor. He is the founding chair of the North American YMCA Development Organization (NAYDO), 1981-1983.

In November 1977, I became the director of development at East Tennessee Children's Hospital. One of the first things I did was to join NSFR. I had learned about the association a few months earlier from a friend who shared its one-page newsletter with me. What excited me was the fact that there was a professional fundraising organization! I had been in fundraising for a national health agency since 1972 and, aside from the educational programs that my health agency conducted, I had never heard of any other fundraising groups.

Becoming a member of NSFR gave me a sense of pride. I was a member of a profession that was much larger than what I had thought existed. NSFR was a doorway that I could step through to become part of a larger world of philanthropy and the nonprofit community.

In 1980, I co-founded what was then called the Tennessee Chapter. I was the first vice president and, later, the president. I transferred my membership to the Alabama Chapter when I moved to Alabama in 1984 and served as its president in 1989-1990. This afforded me the opportunity to become a member of the national board.

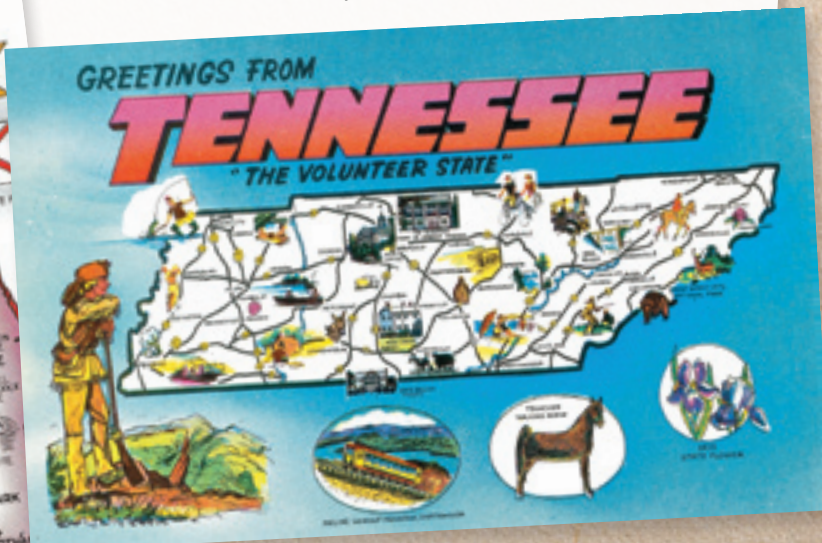
In the early 1990s, I had the privilege of working with the association's finances as assistant treasurer, treasurer and then chair of the finance committee. This was a time when the accounting rules for fund-

raising in nonprofit organizations was under revision by the FASB (Financial Accounting Standards Board), the agency that establishes the financial procedures used by CPAs. For the first time, our association had direct input to the development of the standards that all nonprofits must follow.

Today, it is not uncommon for regulatory groups to seek the advice of AFP regarding policies that affect fundraising. To my knowledge, however, then-President Pat Lewis's and my meetings with the FASB members, along with my presentations to the FASB, constituted the first times that our association (at that time NSFRE) had been consulted by a national governing board. It was gratifying to know that our association had provided significant input to the agency that regulates how our members' organizations account for gifts.

William M. Moran

William M. Moran, FAHP, ACFRE, is executive director of St. Vincent's Foundation in Birmingham, Ala., and joined NSFR in 1977. He received his CFRE in 1982 and was in the first class granted the ACFRE credential in 1993. He served on the board for many years in various capacities, including treasurer and vice chair for professional advancement, and also served as chair of the ACFRE certification board. He currently serves as chair of the AFP Foundation for Philanthropy board. In 2008, he received the AFP Barbara Marion Award for Outstanding Leadership in Philanthropy.



My first fundraising job was as an assistant director of development. Funny thing was, there was no director of development! That was in 1967, the year I joined the National Society of Fund Raisers.

Almost from the beginning, I was amazed at the generosity of donors and the willingness of my fellow professionals to share their collective wealth of wisdom taught through experiences learned—not from books, but from sitting across the table from suspects, prospects and eventually donors.

Throughout my career, I have been rewarded by working with a superb cast of consultants and colleagues. Bill Freyd and Diane Carlson of IDC opened up the entire new world of phone mail, and Dave Thompson and his wife, Mary Pendel, introduced me to the nuances of nonprofit governance, prospect research and major-gift fundraising. But it was Rodger Lyons, founder of Lyons Associates, who gave me the foundation that led me to most of the fundraising practices and principles I follow today.

Rodger taught me the value of working with a strong volunteer organization. His use of the development council concept still rings true today. The integrated long-range development program made up of annual support, planned giving, major gifts and community-relations programs using a volunteer-driven (but staff-guided) organization has over the years produced solid results in practically every setting I have worked. Its core principle was that the development council model could lead an organization quickly into the business of asking. Rodger always said that you can either study a problem or raise money to solve it.

For me, fundraising's core axioms have not changed. People still give to people. Finding the right person to make "the ask" is still essential to a successful solicitation. There is no substitute for a well-thought-out and compelling case. And you still have to go out and ask for gifts!

What has changed is how we count! In 1978, I returned to my alma mater, Loyola University in New Orleans, to serve as vice presi-



dent for institutional advancement. The university was preparing to launch a major fundraising initiative. Up until that time, Loyola had never had a successful capital campaign. Against a goal of \$13 million, we raised \$14.2 million. No unrealized planned gifts were included in the total. The fulfillment rate on pledges was exceptional. At the end of the day, the "money" was on the table for the board of trustees to see and two major buildings were funded. The campaign was not announced publicly until we had 80 percent of the announced goal in hand.

A good lesson here is that the public announcement of a campaign does not ensure its success. Also, artificially high goals do not raise donor sights. During the period of the Loyola campaign, I remember reading about an organization that had just finished a highly successful campaign. However, at the end of the day it did not have the money to invest in the capital projects outlined in its case. The article went on to mention a worrisome trend about how gifts are "counted" to reach campaign goals. This begs the question of what the primary objective is of a capital campaign. Is it to fund the projects outlined in the case or is it just to make the goal?

When organizations struggle with their philanthropic confidence and identity, as a professional fundraiser I offer this simple bit of advice: You can either raise money for what you are or you can raise money for what you want to be. But you must ask! Remember, if you don't ask, the perception is that you don't need!

Charles E. Young

Charles E. Young is president of the Christian Health Ministries Foundation in New Orleans. He joined NSFR in 1967 and was a founding member of the Louisiana Chapter in 1980. He served as the second president of the chapter in 1983-1984, and received the chapter's Outstanding Fundraising Executive Award in 1987. Despite losing his home in Hurricane Katrina, he served as president of his Rotary club in 2005. That same year, he directed a successful volunteer-driven \$1.5 million capital campaign for his parish church, St. Dominic's, in the flood-ravaged Lakeview section of the city, where he and his family have lived since 1967. He considers that campaign his proudest moment in fundraising.

While AFP is celebrating its 50th anniversary, my husband, Bill Freyd, and I are celebrating our 25th wedding anniversary. We met in 1979 when we both served on the national board of what was then called the National Society of Fund Raising Executives (NSFRE). Bill was treasurer of the national board and I was on the board as a chapter president (New Jersey). Those were the days when all of the chapter presidents were on the national board. After meeting on the national board, we became business partners in 1981 in the company Bill founded, IDC. We married in 1984. We've had a great relationship, personally and professionally. Thanks AFP—and Happy Anniversary!

Diane Carlson

Diane Carlson is CEO and William Freyd, CFRE, is president of 1-2-1 Philanthropic Services in Henderson, Nev.

Like most people I know, my career in fundraising has taken many interesting twists and turns. One aspect that has remained a constant through the years is the people who have guided, mentored and affected me by their passion and generosity.

I was the first executive director of the foundation for Presby's Inspired Life (formerly PresbyHomes and Services), which provides quality housing and long-term care for older adults in the Greater Philadelphia region. The historic campus (58th and Greenway Presbyterian Village) in Southwest Philadelphia initially served middle- and upper-income residents, but as in most major cities, that changed over time and the community faced challenges. We were doing a retrofit of the historic campus, building all new buildings for low-income elderly and replacing the skilled-nursing facility.

We did a major-gifts campaign to help with the construction costs, and one of our vendors, Chip Kent, had a company called Culinary Service Network (it was later sold to Morrison Senior Dining). Chip grew up in a working-class neighborhood and had a paper route when he was young to help pay family bills. He attended Valley Forge Military Academy and then entered the military. Along the way he learned to cook, which led to his creating his own company serving senior living communities. My boss, Robert H. Morrow, and Chip both attended Lower Providence Presbyterian Church. When Bob told him about the plans and the campaign, Chip wanted to help. Later Chip and I were attending the same conference in San Francisco, where we talked briefly. After the conference, I sent our case for support, including naming opportunities, to Chip. The day before Thanksgiving we met in my office, where we looked at sketches and discussed his interests. As we talked, he would occasionally glance at a document in the inside pocket of his jacket.

Chip initially expressed interest in the family lounge. As the discussion progressed, it was apparent he was interested in the big main activities room, an L-shaped room wrapped around a secure garden. On the architect's drawing he pointed to a cabinet and asked, "Will there be a large-screen TV?" I explained that there would be a built-in entertainment center with television. He also asked if there would be a piano, and I said that we would move the piano from the old building to the new one. Once again he looked in his jacket pocked and drew out a piece of paper. "I want to do this room," he said. He made a pledge for more than \$100,000.

He explained that when his mother needed skilled nursing and rehab care at the end of her life, the things she enjoyed most were watching television and listening to the

piano. We talked more and he also told me, "One of my mother's cherished possessions, even in the nursing home, was a mechanical Christmas angel. When I think of her, I fondly remember the moments of joy and pleasure a simple Christmas angel provided."

Karen Singer of Karen Singer Tileworks in Philadelphia did the donor recognition. We sent her the image of the angel and she interpreted it perfectly in the commemorative plaque that is on the wall of the Thelma M. Kent Activities Room at Presby's Inspired Life. When we held the dedication of the building, Chip and his wife came early to see the room. I'll never forget his reaction. "I never dreamed I would hear the word 'philanthropy' and my name in the same sentence," Chip said. He was very emotional. It was so heartfelt. He had no idea how successful he had become and was just amazed at what he could do.

Roberta A. Healey

Roberta A. (Robbe) Healey, MBA, NHA, ACFRE, vice president for philanthropy at Simpson Senior Services in West Chester, Pa., joined NSFRE in 1983. Currently she serves as chair of AFP's board of directors. An AFP Master Teacher, she earned the designation in 2000, the first year it was awarded, and has been designated a Faculty Star by the Council for the Advancement and Support of Education (CASE). The AFP Greater Philadelphia Chapter named her 2001 Fundraising Executive of the Year.



The plaque on the wall of the Thelma M. Kent Activities Room at Presby's Inspired Life

I paid my first dues to NSFR in 1962 in Cleveland, when I joined with Tom Dunworth, Bill Fissinger, Jim Hardy and others to help create what was then to be the third (although some say the fourth ...) chapter of NSFR.

In Cleveland, Tom Dunworth was director of development of University Hospitals at University Circle, Cleveland, and had agreed to host the first organizational meeting of Cleveland's NSFR chapter, once we identified the names of those in the practice. Together, we found about 60 names of folks doing fundraising. Bill Fissinger was the vice president of development at John Carroll University and very engaged. Jim Hardy was half of Hardy and Hardy, a husband-and-wife fundraising consulting team in the Cleveland area, and he knew many people.

Tom Dunworth had attended a NSFR board meeting in New York City in 1961 and was fired up about creating a chapter in Cleveland. Tom hosted Cleveland's organizational meeting in 1962 with about 25 in attendance. Officers were selected and Tom continued as chapter president. Tom attended a couple more national board meetings, and in '63 or '64 returned to the Cleveland board with a resolution to withdraw from national because he thought the problems at national were insurmountable. Thus the Cleveland Society of Fund Raisers was formed and continued for years. I had the task of being program chair during much of the 1960s.

In 1972, I was recruited to come to Chicago by the Charles Feldstein firm and immediately joined the Chicago Society of Fund Raising Executives, one of the oldest and largest independent "fundraising clubs in the country." There may have been 75 active members in Chicago, and probably no more than 1,200 fundraisers in the country. I recall Bob Duncan, a leading fundraiser from Harvard, making a presentation in Chicago and stunning the audience with strategies that he and other Ivy League schools were utilizing to raise big money. Harvard's was counseled by Tamblin and Brown, I recall. Imagine, a comprehensive campaign plan! A major-gift strategy! Volunteers and volunteer training! Wills and bequests! All were practices that had been developed by fundraising firms after WWI, in the '30s recession and after WWII that were just coming to light by the firms that had designed them from whole cloth. A revelation for all practitioners new to the field.



Byron Welch

At NSFR, in about 1963, Hank Goldstein had just come off leave from the Oram Group to travel the country giving compelling presentations to dozens of "fundraiser" luncheon groups, urging them to start chapters and to join NSFR to help turn this "practice" into a "profession." I can still hear Hank saying at the Chicago luncheon that "the only responsibility of leadership is to lead!" Chicago, being the largest "luncheon group" not affiliated, had a lot to offer. As chair in Chicago, I had tested a new division structure and brought leadership

and focus to membership development, education and communication, public affairs and the set of typical governance functions. Under the new structure, we had started "So Now You're a Fund Raiser" (Wilson Schroeder) and other professional training programs. We launched a newsletter and started a broad-based membership recruitment program. In addition, we hosted the first volunteer awards luncheon, which continues today, and refocused the society on membership development and public service, rather than governance. And we brought our finances under control. It worked—the Chicago Society of Fund Raising Executives grew.

When I arrived on the national board in 1975, Byron Welch was chair, having succeeded Hank Goldstein. Others, like Bob Pierpont, Jack Bohlen, Harry Aschkinasi from Denver, Steven Smallwood, Jess Spiedel, Henry Steel and more, had their plates full of issues. Above all, Byron was a gentleman, a humanitarian and a visionary (like Hank)—all the attributes required to hold a fledgling organization together. The issues were enormous: few dues-paying members, costs beyond our means and difficulty in recruiting and retaining staff. Beyond that, some chapters wanted in and others wanted out.

In addition, the National Association of Attorneys General was discussing licensing fundraisers to control what they viewed as abuses in the field. Self-regulation and certification were on the agenda. An ethics committee was appointed, and focus was directed at the master's program that Harvard (Bob Duncan) was developing as a way of certifying fundraisers.

In 1977, I accepted the nomination to become NSFR chair with a great deal of trepidation. The tasks seemed ominous. The board functioned as a whole, with committees assigned tasks. There was progress being made, but it was slow. As in Chicago, my feeling was that if we could give solid leadership to each batch of issues, progress could be made—and any progress would be good news!

Thus the division structure that AFP knows today was created, with division heads for membership, education, public affairs and governance. Later we added the Chapter Presidents Council to address chapter-specific issues under the able leadership of Barbara Marion (bless her soul). There were 28 separate committees functioning within the division structure in the first year—too many, probably, but my attitude was that if half of the committees could do half of what was assigned, NSFR would be twice as far ahead.

How well did it work? Ralph Chamberlain headed chapter development and we grew from 12 chapters to 28. Lyle Cook of That Man May See took responsibility for certification and made it a reality. Marilyn Bartter of Campbell & Company wrote the draft of the first Survey Course.

The years 1977 through 1980 were benchmark years for the society. Suddenly board members and chapter members alike shared a vision and found a way to contribute to the whole. Great progress and growth were made!

Also, during this period NSFRE opened the door to becoming an international organization. Barry Brooks, then head of the Canadian Red Cross, was recruited to the NSFRE board and was encouraged to form chapters in all of the provinces across Canada. Eight were formed, and an affiliation agreement was made with the new Canadian chapter affiliates of NSFRE. Barry also spearheaded the creation of the Centre on Philanthropy in Toronto, and the new Canadian chapters hosted the first international conference outside the United States in 1982 in Toronto.



In 1978, the Mexican government (with the encouragement of Byron Welch) invited NSFRE to hold a board meeting in Mexico and use additional days before and after the board meeting to teach courses on a broad spectrum of fundraising topics to Mexico's new practitioners. We met in Guadalajara, Mexico, in September 1979, and I had the privilege of presiding over one of the most interesting board meetings in our history. Credit has to be given to Jesus Gonzalez Labastida and his wife, Maria, for their leadership in setting up the meeting site, arranging the educational sessions and hosting the board. It was an amazing experience!

Donald A. Campbell Jr.

Donald A. Campbell Jr., CFRE, chairman emeritus of Campbell & Company in Chicago, started in fundraising in 1958, while still in college. He joined NSFR in 1962 and served as chair from 1978 to 1980. During his tenure the organization shifted from a primarily committee-driven organization by dividing activities into four major operating divisions (professional education, membership services, public affairs and operations). In 1993 he was given the NSFRE Outstanding Fund Raising Executive award. In August 2002, Campbell was honored by the Center on Philanthropy at Indiana University with the Henry A. Rosso Medal for lifetime achievement in ethical fundraising, and in February 2006 he received the AFP Founders Medallion, which is given to an individual for extraordinary leadership and contributions to the association.

The friendships gained from NSFRE are hard to control, and they always have an interesting end. (Don Campbell having my picture taken in front of a large condom store in Toronto comes to mind!) But I always remember the following because it seems so unreal.

I was to meet a Philadelphia friend at the Baseball Hall of Fame in Cooperstown, N.Y. Our cars pulled in to the parking area at the same time. I jumped out to greet my friend, and soon found myself also embracing two New York City NSFRE friends. This spilled over to having the pleasure of hosting 35-plus benefactors from the Philadelphia Museum of Art for three days in Toronto.

The private visits were extensive and raised considerable funds, and the schedule was nonstop: On day one, there was an 11:30 a.m. airport pick-up, followed by luncheon at noon on the top of a building. At 1:15 p.m. there was a tour of a corporate collection,

The Beggar's Banquet, May 5-7, 1976, Toronto, Ontario.



at 2:30 p.m. Ken Thomson (Reutter Thomson) gave a talk on his Eskimo collection and at 4 p.m. we enjoyed the lieutenant governor's reception and his collection. At 6 p.m., the Granite Club dinner included visits to the extensive collection in many, many rooms. We had dessert at 8 p.m., followed by wine in a private home filled with European 16th-, 17th- and 18th-century paintings worth more than \$20 million. At 1:30 a.m. we got back on the bus and returned to the hotel. That first day's fundraising alone exceeded all previous years by 100 percent, and I have no idea what the second and third days netted. It was a fun fundraising time!

As a result, in May 1976 I held the first Canadian fundraising seminar and called it the "Beggar's Banquet." People from all areas and institutions arrived for the three-day event where leaders spoke about companies', foundations' and wealthy individuals' responses to requests for funding. Speakers included Byron Welch, president of NSFR; the Hon. Margaret Birch, provincial secretary for social develop-



NSFRE board of directors meeting, Guadalajara, Mexico, Sept. 7, 1979.
Top row (l to r): Bill Arnold, Steve Smallwood, Don Campbell, Sarah Coviello, Jim Maxwell, Jack Bohlen. Middle row (l to r): Wilson Schroeder, _____, John Martin, _____, John Tabor, Joe Greco, Curt Roberts, Don Johnson, _____, Rhoda Spuhler, Diane Carlson, Nike Whitcomb, Byron Welch, Bob Trefry, Barbara Marion, _____, Dorothy Sutherland, Tom Sanberg, Linda Chew, Ken Merwin, Vince Bradley, Helen Moss, Jack Kehrborg, Shirley Brown, Bill McDanel, Dick Wilson and Bill Freyd (off the picture). Bottom row (l to r): Carol Landberg (staff), _____, Rod Varney, _____, _____, Jesus Gonzalez Labastida, _____. I think the missing names are Mexican guests who also attended the meeting ...

I remember a time at the board meeting in Mexico in 1979 when we all started telling jokes and were hilariously involved. We were in committee sessions, I believe, when it all started. One of the jokes involved tapping the person next to you on the shoulder (part of the punch line), which we continued to do throughout many board meetings thereafter. Barbara Marion was one of the chief culprits, along with Jim Maxwell, Don Johnson, Tom Sandberg—and me. I'm so ashamed! I never could stay away from a good bit. Welch and Blum were the curmudgeons. Campbell snickered.

I also recall when I was on the first certification board. I showed up at a conference and members of the certification

committee told me that I had to report to a room upstairs to take the CFRE exam. I had no knowledge that this was going to happen, but apparently it was necessary because we were launching the project at the conference and all the committee members needed to be CFREs at that time. I passed!

John D. Tabor

John D. Tabor, FAHP, executive director of The Crisis Pregnancy Centers of Tucson in Arizona, joined NSFR in 1974. He served for several years on the board in various capacities, as well as on numerous board committees, including government relations and certification.

ment; and Harold D. Barbour, vice president and senior consultant with G. A. Brakeley & Co., to name a few. The net profit enabled the founding and funding of the Canadian arm of NSFRE.

Barry L. Brooks

Barry L. Brooks lives in Toronto, Ontario, and joined NSFR in 1968. In 1976 he underwrote the "Beggar's Banquet," and in 1982 the first NSFRE annual conference was held outside the United States in Toronto.

The Beggar's Banquet was held at the Westbury Hotel in Toronto.



I was at St. Francis Hospital in Evanston, Ill., during the 1970s and 1980s. We were proud of the strides we were making on the local and national level. Having 40 people attend the monthly luncheon was a major accomplishment, but leaders like Don Campbell and Nike Whitcomb always pushed us to do more—and we did. One funny memory was of a local foundation leader who loved to speak to us and encourage us to help the "little people." Some of us became convinced that she thought we worked with midgets! Or perhaps her hubris was coming through ... ! It was professionally and personally rewarding to help NSFRE grow into AFP and be the great organization it is today. I am retired now, but have many memories of my 40 years in the fundraising field. Best wishes on the next 50 years!!

Vernon Dockery

Vernon Dockery is retired and lives in Parrish, Fla. He joined NSFR through the Chicago Chapter in 1974 and later served as monthly program chair, government relations chair and co-chair of the national conference when it was held in Chicago. The Chicago Chapter presented him with the Ben Franklin Award, which is bestowed on "a fundraising professional who has attained significant achievements in a long career and is looked to by the profession as a role model." He also belonged to the NSFRE Twin Cities Chapter from 1984 to 1989.

I remember a number of the national board meetings, especially the one in Guadalajara, Mexico. We had a great time and lots of work. The hotel was out of town, so we spent the nights in the disco bar. (Lots of stories about that, which shall go unpublished!)

I also recall a number of meetings of the national board in various places and some of the issues that were prevalent at the time, including the motion not to hold a national conference in any state that had not ratified the Equal Opportunity Act. I was a member of the national board and chair of the program speakers at the Los Angeles conference. I have great memories of a number of the board members of the past and present who were great professionals, as well as great individuals personally. They always were a part of a fellowship.

I have particularly fond memories of Ralph Chamberlain, of the fellowship and leadership that he was responsible for during a number of the national board meetings, especially the one that was held on a cold winter night near the Newark airport, I believe at a Holiday Inn. I also recall some of the competitors in the fundraising organizations, the fellowship that took place during these meetings and the gentle barbs that went back and forth between American City Bureau CCS and Campbell & Co.

I look back at some of the discussions that took place concerning allied organizations having meetings before and after the AFP conference and realize how important they may have been. I recall the YMCA, the Red Cross and I believe The Salvation Army all had meetings that ran either the week before or the week after the AFP conferences. Now these organizations have grown to have great conferences of

their own, such as the North American YMCA Development Organization (NAYDO) conference. All these organizations have grown as a result of AFP members' being involved with and in these organizations.

Vincent G. Bradley Jr.

Vincent G. Bradley Jr., FAAMA, is president and CEO of Bradley Associates Consultants in San Jose, Calif. He joined NSFR in 1968 and has been a member of four different chapters over the years: Illinois, San Francisco, Los Angeles and the Silicon Valley Chapter. He was named Professional Fundraiser of the Year by both the Los Angeles and the Silicon Valley chapters. He continues to be active in his local AFP chapter, serving on the membership committee and previously as chair of the annual committee.



The Hotel El Tapatio in Guadalajara, Mexico, where the September 1979 NSFRE board meeting was held.

joined NSFR in 1976 and have worked 33 years for my professional organization—and have loved every moment of it! NSFR was quite a different organization 30 years ago than today's AFP. There was no Leadership Academy. Instead, there was a very large board of directors, and chapters had their representative as a board member. Staff was very small, and volunteer members carried out the majority of the work and development of programs, individually or on committees. The annual conference was not international in scope, although we did have visitors from some foreign countries. However, the biggest difference was that there were few, if any, staff to work the conference. Instead, almost all of the work was done by the “host chapter”—selecting the hotel and working on all arrangements for lodging, meals and meeting rooms; developing the tracks and securing the presenters; deciding on the “headliners;” developing the promotional pieces; and arranging the social programs. It was easily a full year's work

for a chapter! The reward was worth the effort, for you got to really know the other professional volunteers in your city and around the country and develop deep and long-lasting friendships. Many of them are still my best friends!

Betty Bergstrom

Betty Howard Bergstrom, CFRE, is principal of Bergstrom Associates in Chicago. Since joining NSFR in 1976, she has served on the board of directors, vice chair of external relations, government relations chair, the PAC board of directors, various committees (finance, membership and marketing and communications) and numerous task forces. She has served several times on the board of the Chicago and Greater Arizona chapters and on many committees—basically any job that needed to be done! In May 2009, she was recognized for her many accomplishments in fundraising with the Benjamin Franklin Award presented by the AFP Chicago Chapter.



have many wonderful recollections as a member for 40-plus years. I joined NSFR in 1968 while working in Buffalo, N.Y., as associate director of development for Canisius College. My boss supported my membership as a way to learn more and to “get involved in a professional career in fundraising.” He championed NSFR as the most

important “national” group for education and standards available. He was right.

I’ve had the pleasure of working with Hank Goldstein in the early 1970s to start the Western New York Chapter in Buffalo while there, and then encouraging an informal group of PR and development professionals to affiliate/reorganize while in Westchester County, N.Y., in the mid-1970s. I later moved to Pittsburgh and stayed active in that chapter, and then moved to Arizona where there was no chapter, but rather an informal group of local fundraisers. In the early 1980s, I helped move our Arizona fundraisers group into formal affiliation as an official chapter here in Phoenix. At the time, one could belong to the local chapter and opt to *not* join NSFRE. When a chapter was organized in Tucson, I proposed the name change to the Greater Arizona Chapter, which was adopted by the membership at that time!

These chapter-creation moments were most meaningful because of all the professionals who have benefited from chapter memberships. I kept active in AFP while also maintaining membership in the Association for Healthcare Philanthropy, since it is focused on healthcare. I still believe AFP was valuable because it captured all my peers in the development business where I worked. It’s been a most valued source of education and networking throughout my career.

Stuart R. Smith

Stuart R. Smith, CFRE, FAHP, principal of Not for Profit Resource LLC in Phoenix, joined NSFR in 1968. During his travels he has held all chapter officer positions and many chairmanships, primarily in education, mentoring, career services and certification.

My career in fundraising began in 1969 when I went to work for a couple of months at an Episcopal church to assist with its annual budget campaign. The church had hired a “professional” fundraiser and I was his secretary. Then the next year the church hired me to run the budget campaign using the system that had been set up by the fundraiser the year before. In 1975, I also began raising funds for the Episcopal school.

I continued this seasonal job (with the Episcopal church and school) until 1977, when I attended Byron Welch’s Southwest Institute of Fund Raising and learned that I, too, was a fundraiser! That’s when I learned about NSFRE (National Society of Fund Raisers) and joined the Fort Worth branch of the Southwest Chapter. It seemed that all of Texas was in the Southwest Chapter!

In about 1979 or 1980, the Dallas branch decided to become an independent chapter (and then it could have its own representative on the national board). That forced all of us to become separate chapters. We grumbled about it at first, but soon realized that it was the best thing that happened to us because we began to add members and had 39 charter members in 1980. When I joined NSFRE, the majority of the members were men because they were the heads of the nonprofits or were consultants. I continued to raise funds for the church and school.

In 1980, the late Bill McDanel was the president of the Southwest Chapter and also the first president of the new Fort Worth Chapter. I became president of the Fort Worth Chapter in 1981 and began recruiting new members for our chapter. I established the first annual awards program and the first annual all-day Fort Worth/Dallas fundraising seminar. Of course, I have held many other positions in the chapter, including serving as chapter membership chair and teaching classes in the Certification Review Course and the First Course in Fund Raising.

By virtue of being chapter president, I was on the national board of NSFRE. That was about the time that the CFRE program was being launched, and one of the practice exams was conducted in the Dallas/Fort Worth area. About 20 of us took this test. In 1982 I attended a NSFRE national board meeting in San Diego and we were all encouraged to take the CFRE exam. I took the exam and became a CFRE in 1982.

As I recall, it was soon after that (Tom Sandberg was NSFRE national president) when I was elected to the national board of NSFRE as assistant secretary. That’s when there were about 150 members on the national board because every chapter had a representative and there were lots of at-large members. Later, I was elected secretary and then rotated off the board in about 1990.

In 1986 I was ready for a full-time job. I left the church and school and went to work as the Junior Achievement development director. That was followed by development positions at a Catholic high school, an AIDS agency and an AIDS housing facility, as well as executive director at Prevent Blindness Texas.

I retired from full-time work in 2007, volunteered some in 2008 and in 2009 began working part-time at an equestrian therapy center.

Carolyn Martchenke

Carolyn Martchenke lives in Burleson, Texas, and joined NSFRE in 1977. She served on the board in 1985–1987; at the chapter level she was chair of the 1995 National Philanthropy Day event and also served as chapter diversity chair.



In 1952, I answered an ad in *Church Management* magazine for a position that indicated public relations with a Protestant organization. I have a strong Protestant background, and so I responded. The result was a job with a New York fundraising firm that put me on a series of Catholic fundraising accounts. I could not use the Protestant experience to hype or bull my way through, which turned out to be lucky. It forced me to rely on technique. As a result, I learned my craft very quickly and very well.

As a fundraising executive, I had to keep in mind that I was neither the cheerleader nor the spokesman for the worthy causes. My greatest role has been to find the cheerleaders and the spokespeople and to lift their hands up and provide them with the weaponry they needed in the way of technique, support, materials, timing,

assistance and encouragement—all of the good virtues that fundraisers bring.

Back then there was nothing like NSFRE. There was nothing we could aspire to and belong to. That's why I joined so very early (in 1960). It seemed to me that if I was going to be a fundraiser, I ought to support the organization dedicated to our profession.

The things I have gotten from NSFRE are simple and few: I have received more love than I could ever give. I have received more lasting friendships—with all of the beauty that comes with a friend—from people I otherwise never could have known. I could go anywhere in this country and have people who I know are my friends. I have developed

In 1978 I was totally surprised to receive an invitation to a meeting of the "Michigan Chapter of the National Society of Fund Raisers" to be held at the Detroit Renaissance Center. I quickly registered and was pleased by the quality of the speakers, although nothing was ever mentioned about forming a chapter! There were perhaps 35 attending, and it was a quality event. I had been thinking of starting a chapter myself and was relieved that my work apparently had been done by others. I waited almost a year for the other NSFRE shoe to drop, but it never did. I discovered that the event had been put on by Jack Slater and Mary Shapero. There was, in fact, no Michigan Chapter, and only five "at-large" members of the national organization in the whole state, namely Donald M. D. Thurber, Dr. Michael Radock, Jack Slater, Mary Shapero and me.

As I pressed on to get something going, everyone I sought out seemed to "know of" Don Thurber, but almost no one actually knew him. However, he seemed to be the key to credibility in the profession in Michigan. His firm, Public Relations Counselors Inc., was the bellwether firm in the field in the state of Michigan at the time (it was established in 1958; I later bought the firm). I went to see him at his home in Grosse Pointe. Don had recently suffered a stroke and could not actively participate in very much. However, he allowed me to use his name for introductions and enthusiastically wanted to be a charter member of the new chapter. Mike Radock at the University of Michigan was my second call, with similar results. Both gentlemen became my valued friends for the remainder of their lives.

I found that aside from "knowing of" Thurber, Radock and a few loose connections to Slater, I was hard-pressed to find two professionals in the state who actually knew each other (other than in their own shops)! Feeling that the chapter should truly be a state chapter and not just Detroit, I found Russ Gabier at Western Michigan University

and roped him in quickly and most eagerly.

In the spring of 1979, I shipped off to Washington, D.C., to attend the NSFRE annual conference. At that meeting I met the past chair, Byron Welch, who gave a presentation on professionalism that still rings in my soul three decades later. I vowed then, and successfully, to claim that man as my lifelong friend. He is now godfather to our firstborn. (An earlier godfather, Stanley S. Kresge, had since gone to heaven.) It was at that D.C. conference that I sought out the new national chairman, Don Campbell. I asked him if he would come and speak at our first official chapter meeting in July. He scoffed and laughed at the idea of forming a chapter so quickly as impossible. I challenged him and made him hold the date.

Our first official meeting took place at the Michigan Inn in Southfield in July of that same year, and we submitted our charter for membership to Campbell and received a \$300 check from national to help us get started. Forty people attended,



a sense of esteem, of modest esteem, for what it is that I do. I have been able to think through and articulate some of the nuances of what philanthropy is all about. It has been good for me to know that I am a part of something that's much bigger than I am. I have been able to grow through that.

Byron Welch

Byron Welch, a native of Kansas City, Mo., founded the Texas Society of Fund Raisers in 1968, which ultimately became a part of NSFR. He served as founding president of the Texas Chapter in 1968–1971 and served on the board of directors from 1968 to 1989. He was NSFRE vice president (1973–1975), president (1975–1978), chairman (1978–1979) and president of

the NSFRE Foundation (1979–1992). He co-founded the Greater Houston Chapter and received the Outstanding Fund Raising Professional award from that chapter in 1985. He also served as founding trustee of the foundation (the NSFR Institute) and the certification program. He was one of the first recipients of the Certified Fund Raising Executive (CFRE) credential. In 2002, AFP presented him an honorary lifetime membership, and in 2005 he became the fourth person to receive the AFP Founders Medallion, which is given to an individual for extraordinary leadership and contributions to the association. The Greater Houston Chapter also established the Byron Welch Award for Lifetime Achievement in Fundraising, which is given annually. In May 1947 he married Mabel Holmberg; they have a son (Byron Jr.) and grandson (Byron III), who is at the University of Texas.

besides Campbell, of which 30 were *new*, dues-paying, at-large members by then. (To put this in perspective, there were only a few hundred members nationwide at the time—we shook things up!) About this time, I came across Keith Bankwitz of the American Lung Association in Detroit. Keith turned out to be the most eager worker I discovered in those early days. I soon had Jim Keyes on the board and he, too, dug in and worked hard.

I was appointed chapter president by Don Campbell at the July meeting for a period until we had bylaws in place and a board, etc. I was then elected president for three terms, during which time I automatically served on the national board. I was elected to the national board for a number of years after maxing-out my term as chapter president.

In 1980 I suggested to the board that we should have our own state “Fund Raising Institute.” One of my good colleagues on the board was Anthony Tersigni. It was my opinion that the sequential approach to fundraising would also work to secure the most stellar faculty ever seen in the field. Then, as now, the name of Conrad Teitell was at the top of the pecking order in the field in the United States. Tony and I conspired to engage Teitell for estate-planning seminars at our respective institutions, one on October 20, 1981, and the other on October 22, which we did. This left Conrad stuck in Detroit on the 21st with nothing to do. Voila! After “persuading” him to be on our faculty, I next went to my then new friend, fundraising’s historic leader George A. Brakeley Jr., and the Teitell name did the trick. With Teitell and Brakeley in tow, soon I had Jerry Huntsinger (direct mail giant). Extraordinary nonprofit lawyer Bruce R. Hopkins, international counsel and NSFRE pioneer Byron Welch and University of Michigan Regent Sarah Goddard Power could not resist sharing in the glow of these other giants. Each of these people were at the very top of the heap

in their respective professions, really legends throughout the country. For our keynote speaker I managed to cajole the late and truly awesome wordsmith William H. Baldwin, Esq., legendary chairman of The Kresge Foundation (the Council of Michigan Foundations could not get him to give a speech!). We decided to top it off by giving Joe Hudson the “Philanthropist of the Year” award.

It was thus that more than 300 attended our first annual chapter event, which has evolved into National Philanthropy Day. By the time I kicked myself out of the nest, this event was flourishing annually, and I had lined up Jim Keyes to become the chapter’s second president. I could not have left things in better hands. At that time we had a single Michigan Chapter with three meeting groups. Russ Gabier held forth in Western Michigan with a robust group and Jim had fostered the same in Mid-Michigan that met variously in Flint and elsewhere (I regularly attended all three!) These two later became chapters in their own right.

It was a fun and busy time, watching with amazement and amusement as the new profession started to flex its muscles and try to fly. Would I do it again? Not at my age!

I am often asked what the greatest thing was that I experienced over the long years. It was the evolution of the organization’s name from NSFRE to the Association of Fundraising Professionals. The salient point made by the name change is that we are not professional fundraisers, but rather fundraising professionals. We do not, or should not, solicit or raise money. We should guide, teach, motivate and inspire volunteers to raise money.

Robert Getz

Robert Getz, principal of The Getz Development Group in Newaygo, Mich., joined NSFRE in 1977. As written in the board minutes of the September 1979 meeting in Guadalajara, Mexico, “Byron Welch then presented to the board the petition from the newly formed Michigan Chapter for chapter status in NSFRE, 32 members. The petition was accepted, making the Michigan Chapter the 25th NSFRE chapter.”

In October 1998 at the annual Delegate Assembly, one delegate made a motion from the floor that since the National Society of Fund Raising Executives was now an international organization, we needed to consider a name change. Ron Carroll, CFRE, was presiding, and he and Barbara Mulville, CFRE, chair-elect, appointed me, as incoming vice president for external affairs, to chair a task force to report back in October 1999 with a suggested new name. We agreed that we wanted a small, yet diverse committee and so we selected Steve W. Batson, incoming chair-elect; Doris Heiser, chair-elect of the then NSFRE foundation; Rolando Rodriquez; and Penny Scarpucci to serve. Paulette Maehara, president and CEO, was the sixth member of the task force.

We held numerous telephone conferences and met in person in 1999 at the international conference in Miami. During the year, we solicited name suggestions from the society and foundation boards, as well as the membership at large. We received about 40 different possibilities. Many individuals felt the best solution was to just drop "National" and rebrand the organization as the "Society of Fundraising Executives." However, we discovered that there was already a Canadian organization with that same name. Other suggested names did not translate well in other languages, particularly Spanish. The committee was also mindful of the initials of a new name, and some suggestions had to be eliminated due to possible confusion with other organizations or because the initials spelled an odious word.

I do recall some of the suggested names:

- New Society of Fund Raising Executives (NSFRE)
- North America Society of Fund Raising Executives (NASFRE)
- Society of Fund Raising Executives (SFRE)
- Society of Development Professionals (SDP)
- International Society of Development Professionals (ISDP)
- International Society of Fund Raising Professionals (ISFRE)
- Society of Philanthropy (SOP)
- Society for World Wide Philanthropy (SWWP)
- Society for Fund Development (SFD)
- Society for Giving (SG or SFG)
- International Society of/for Philanthropy (ISP)
- Association of Fund Raising Professionals (AFRP)
- Association of Fund Raising Executives (AFRE)
- Society for Philanthropic Management (SPM)
- Philanthropy Inc. (PI)



By June we had narrowed the list to 10 proposed names, and then I invited the executive committee to join the strategic planning committee, chaired by Steve Batson, to join in a discussion of the short list of names at the summer board meeting in Toronto. The task force also worked with an outside public relations firm to receive input regarding target audiences, constituent reaction, foreign language translations and related issues.

By September we realized that we needed more time to explore the issue, and we said that we would report back at the Delegate Assembly in October with a recommendation for vote by the delegates.

We held more discussions and worked closely with the public relations firm to finalize the suggested name and then roll out the announcement at the Delegate Assembly.

It was somewhat of a surprise to us how seriously members felt about the name, and the ongoing debate and decision took a year longer than expected. In particular, there was considerable discussion over two aspects of the name: "fundraising" versus "development" and "professional" versus "executive." In the end, the name Association of Fundraising Professionals (AFP) was adopted and the organization's name officially changed in 2001.

Colette M. Murray

Colette M. Murray, J.D., CFRE, is CEO of Pascal Murray Inc., an executive search firm headquartered in Indio, Calif. She joined NSFRE in 1990, served on the board in 1999–2002 and was the association's board chair in 2003–2004. She has served on the ethics committee and strategic planning committee. She was government relations chair and also served on the foundation board, among many other positions.

In December 1980, we got off to a good start with the certification program with this insightful comment by Byron Welch, which I paraphrase: "Our work should be to ensure that all those who wish to qualify for the CFRE designation are given every opportunity to do so. We should not think of the certification process as exclusive, but as inclusive, or it will fail to attract those who want to help us and themselves elevate our vocation to a profession." Personally, I appreciate the confidence of my colleagues who allowed me to serve for seven years as the first chair.

We benefited early on when such prestigious practitioners as George Brakeley Jr. and Hank Goldstein applied for certification. When Hank first submitted his application, he tested our process by writing across the application, "You know who I am." We did, of course, but to make the process authentic, we returned it and said that completing it was required. He did in good order and, on reflection, I suspect he respected us for keeping the process valid.

I had the privilege of following Hank as chair of the ethics committee, where I managed the process of writing the guidelines needed to implement the code, written when Hank was chair. While I have forgotten the many people who were involved, one person stood out as an expert wordsmith: Barbara Marion!

Soon after we founded the Delaware Valley Chapter (now the Philadelphia Chapter), we organized what I recall was the first annual conference outside the greater New York area—and it was the first to schedule multiple sessions from which participants could select. In fact, we asked people to pre-register for the sessions they wanted and issued passes for them when



they registered. I also believe it was the first multiple-day conference.

Some of things I take the most satisfaction from are what I did to help get key people to take on tough tasks. A good example is pressing for Chuck Lawson to chair the foundation in 1983. It was his creativity and tenacity that established levels of giving and recognition for the annual fund. Until he took over, it was a pretty moribund effort. Another example was helping elect Charles Stephens as NSFRE's chair. His exemplary leadership moved our organization miles along the way toward inclusiveness.

Robert Pierpont

Robert Pierpont is a fundraising consultant in Bonita Springs, Fla. He joined NSFR in 1961 and later helped form the Delaware Valley Chapter, which became the Greater Philadelphia Chapter. He was a founding director of the NSFRE foundation and served as president of the foundation in 1976–1978 and as chair in 1979 and 1980–1981. He was also the first chair of the NSFRE certification board. He was the first donor to make a planned gift to the foundation, the Pierpont/Welde Research Library Endowment Fund of the AFP Foundation for Philanthropy. The AFP Affiliate Library program, a collection of 36 books in 62 public libraries, university libraries and nonprofit resource centers throughout North America, is now named in his family's honor. At the 2006 Delegate Assembly, he received the AFP Founders Medallion, which is given to an individual for extraordinary leadership and contributions to the association, and in 2007 he received the Henry A. Rosso Medal for lifetime achievement in ethical fundraising.



Hank Goldstein, CFRE

was in the group that took the first CFRE exam in New York in 1981. We were all talking about whether or not we could pass—none of us felt well prepared. After the exam began, we were first instructed to complete several demographic details and practice filling in exam boxes before the four-hour exam started. Then, after everyone was ready, the exam began. We were all concentrating fiercely, heads down and eyes glued to the exam questions. After only 45

minutes, one guy got up, handed in his answer sheet and left the room. After just 45 minutes since we had begun! I learned later that not only did he pass, but 45 minutes also has to be the world's record for the CFRE exam. It was Hank Goldstein, CFRE.

James M. Greenfield

James M. Greenfield, FAHP, ACFRE, is president and CEO of J. M. Greenfield & Associates in Newport Beach, Calif. In 1969 he joined the new Los Angeles chapter. After moving to Boston in 1973, he joined that chapter and served on the board with a legislative affairs assignment. He was invited to join the fundraising cost study committee in 1975, and in 1979 Byron Welch asked him to accept an appointment to the NSFRE board. In 1981 he was invited to join the board of NICE, precursor of the NSFRE foundation. He continued on both national boards for several years, serving on multiple committees. In addition, he was in the first CFRE class (1981), helped design the ACFRE program and test and was honored by NSFRE as the 2000 Outstanding Fund Raising Executive.

I first became aware of the National Society of Fund Raisers (NSFR) while I was attaining my undergraduate degree at Salem College, W.Va. (1961–1965). I was enrolled in an American Humanics Program, one of the few degree programs at the time that focused on nonprofit management. I recall the feeling that I had when I heard about this new organization called the National Society of Fund Raisers. To me it seemed to be the beginning of a long process to officially recognize my anticipated life's work as a professional. I became a member of NSFR in 1965 (before I attained my BA degree in human relations). This was due to one of my professors' insisting that I do so to ensure that I kept up to speed throughout my career in the art of fundraising. While I knew Weaver Marr as my professor, he actually had spent most of his career in nonprofit administration. He also headed the nonprofit administration degree program offered through American Humanics at Salem College. Weaver provided me one of the best pieces of advice I ever received.

A mentor of mine and an individual who also became a good friend, Frank Fultz, became a Certified Fund Raising Executive (CFRE) in 1981. I believe it was the first year that the certification was offered. Frank was very proud of that distinction, and it did not stop him from encouraging me to strive to attain the certification as well, even though I had not achieved the recognition or experience that he had at the time. With his encouragement, I obtained the CFRE in 1982. The CFRE distinction has helped me to not only maintain my skill level through lifetime learning, but attain the career positions that I sought as well. Through Frank's example, I continued to encourage nonprofit leaders to attain the CFRE.

What I like the most about AFP is its down-to-earth culture. I belong to other professional societies that strive to demonstrate how grand they are, from what they accomplish for its members in Washington, D.C., to the benefits they provide. AFP plays the game differently by providing a personal touch, and through its culture it encourages members to support each other in what seems to me to be more of a family model than a professional society. I think this approach comes from the founders' point of view of how fundraising professionals build lasting relationships to fulfill their on-the-job goals.

NSFR/AFP has gone through a number of changes, yet it has been a healthy process because it has ensured the organization's remaining on the cutting edge. The founders would be pleased to know that AFP continues to adhere to the core mission that created the organization in the first place.

Walter P. Pidgeon Jr.

Walter P. Pidgeon Jr., Ph.D., CFRE, CAE, president and CEO of the U.S. Sportsmen's Alliance in Columbus, Ohio, joined NSFRE in 1965. Over the years he has taken on leadership positions at the chapter level wherever he worked throughout the country. At the national level he has been a presenter at annual conferences and was also on the staff briefly in 1995–1997 to direct a special project called "Design for Leadership." It was during that time that he published his first book, *The Universal Benefits of Volunteering*, The AFP/Wiley Fund Development Series (John Wiley & Sons, 1997).



I learned so much about grassroots fundraising from Milton Murray. In the 1980s I joined the NSFRE foundation board. Milton was on that board and I served with him on the Every Member Campaign. The member response at that time was embarrassingly low, and the infrastructure at the NSFRE office was in its infancy and not always reliable. So Milton took it upon himself to organize us all. With stacks of postcards in hand, he wrote to every chapter president and everyone on the foundation's and society's boards, urging their participation. It was an all-out assault, and Don Campbell was there to lead the charge. It was amazing to me to watch a group of first-class fundraisers set up the Every Member Campaign from the ground up, using their great skill sets, energy and commitment, coupled with loads of enthusiasm. I was there with the best, and it was an honor.

Claudia A. Looney

Claudia A. Looney, CFRE, FAHP, senior vice president at Childrens Hospital Los Angeles in California, joined NSFRE in 1982. She was on the NSFRE foundation board for several years and served as chair in 1994–1995. She also served on the society's planning committee and executive committee.



Milton J. Murray, FAHP

I remember an attempt by my staff at my headquarters office to “clone” me. I’m not sure why, for I worked each day, in part, to have their lives filled with assignments and duties and jobs to do! Nonetheless, I thought, “Hey, this might be a good idea, if only so I could be even more involved in my AFP activities!”

In any case, they thought having two Milton Murrys around would be a good idea. I was prompted to recall this when Sherree Parris Nudd sent me a photograph of a standing full-size cardboard image of me—along with a staff colleague—posing for the camera. In the photo she sent it was possible to see, around my image’s neck on a string, a hangtag advertising the 1994 Quote-a-Day calendar our office was selling at the time.

On the photo, Sherree wrote these words: “We tried to clone Milton so he could be in more places at one time.” Thus, the photo was not exactly an image of me, but instead a device that was made to create that effect. What she was referring to was a life-size cardboard cutout that looked like me on a good day—well-dressed, with white shirt, blue blazer and conservative red-and-blue tie.

What few people knew was the genesis of the cardboard cutout itself. Here it is, the story told publically for the first time, for all to know and be mindful of.

The origin of this life-size standing image of me was actually a cardboard cutout representation of former President George H. W. Bush, which my staff had run across and decided to use to replicate me. They removed George’s “head”—without the knowledge of the Secret Service, I’m pretty sure—and then attempted to blow-up a photo image of just my head and neck by repeatedly increasing the magnification on the photocopy machine.

They then somehow attached my head on the body of the former president to create a life-size representation of a guy who looked like me. While the similarity to me was very apparent, I still had to do most of the work—the life-size cutout didn’t draft proposals, write letters, scribble postcards or make or answer telephone calls. So the cloning didn’t work as intended. About the only positive effect was that it served as a reminder to the staff when I was gone that I was there in spirit, if not in the room, and that they’d better get back to the work



The Milton Murray “clone” also proved to be useful for greeting guests at holiday parties!

that needed to be done—before I actually showed up in the office!

Milton J. Murray

Milton J. Murray, FAHP, received the Si Seymour Award (1980), AFP’s (then NSFRE’s) Outstanding Fund Raising Executive award (1991) and the Indiana University Center on Philanthropy’s Henry A. Rosso Medal for lifetime achievement in ethical fundraising (1992)—the only person to have received all three distinguished honors. He also received the Founders Medallion in recognition of his extraordinary leadership and contributions to the association. He worked for more than 50 institutions on two continents in 12 countries. He spent three years as a consultant in Latin America at the request of the Ford Foundation and established four funds to support education and health. In 1973 he founded the Seventh-day Adventist Church Philanthropic Service for Institutions (PSI) and served as director for nearly 20 years. In addition, he spearheaded the “longest, most determined—and costliest—advocacy campaign in U.S. postal history” to produce a postage stamp in 1998 honoring philanthropy. He was a founding and emeritus board member of the AFP California, Desert Communities Chapter.

Milton submitted this story shortly before his death on Dec. 9, 2009.



My earliest recollections of AFP are attending conferences where only two or three women were in each seminar. But this didn't impede our attendance. We were there to stay and we stayed mightily up to and beyond Barbara Marion's taking the chair on both the association and foundation boards.

My first official position on the national stratosphere was on Paul Netzel's membership committee, and although never a member of the association board, I even chaired a special committee. As many of us will recall, because of the structure in the early years, officers of the chapters attended all national board meetings, and what a gathering that was! Everyone had the opportunity to share opinions, and they were freely given in the formative years.

Shortly after the foundation was founded, I was privileged to be elected to that esteemed board under Stephen Levy's chairmanship and served for eight years, the longest service anyone has had on the foundation board. Prior to and during those eight years, I served on and chaired several of its committees. As chair of the Omega Circle (planned giving) in 2009, we realized the most new members in a single year. I'm having the privilege in 2010 to serve as treasurer/secretary of the foundation board.

I have golden memories of working with Milton Murray on a community relations plan, not only to strengthen and grow our chapters, but also to communicate our message to the public in general. What a struggle it was—sometimes we'd be the only two in attendance at meetings, but Milton never gave up (as

was experienced in finally getting the philanthropy stamp approved).

Like Hank Goldstein and Paul Netzel, I, too, was privileged to obtain my CFRE in the first year it was offered (1981) and had the distinct pleasure of teaching the Survey Course to many candidates over the years in

Southern and Central California.

Chapter development was especially important in the formative years to strengthen and build our national presence. Our fledgling members understood this concept because they knew the benefits that all members would receive from a national and now international presence.

Friendships remained strong over the years and became as important as the work we were doing to train, as much by example as by textbook, our younger colleagues as the fundraising profession became a recognized discipline in many special schools and prestigious universities.

Congratulations to all my esteemed colleagues who have brought us to our 50th anniversary!

Mary Jean Gilbert

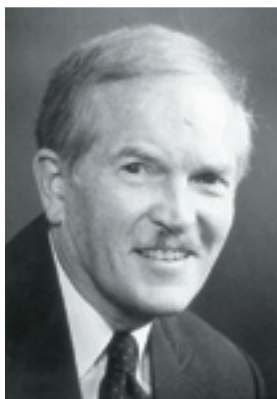
Mary Jean Gilbert, M.A., CFRE, is principal at Forster-Gilbert Associates in Redondo Beach, Calif. She joined NSFR in 1976, the same year she joined the Greater Los Angeles Chapter. She was a presenter at the first national conference in Los Angeles in 1977. She was also president of the San Diego Chapter for two years in the mid-1980s, and when she returned to Los Angeles she served as the Los Angeles Chapter president in 1995 and 1996 (the year of the last national conference in L.A.). She has been very active for years with National Philanthropy Day and was chair of the chapter's event the first year—which had 1,000 participants. In 2010, she is a member of the Committee on Directorship and the Omega Circle campaign committee. She also will receive the AFP Founders Medallion for her extraordinary leadership and contributions to the association.

In the decade prior to my becoming NSFRE chair, I must have served in every volunteer leadership position imaginable. At one point, in 1985, I was asked to be the national treasurer. This was in spite of my not having any training, or experience, in accounting. Dick Wilson, our CEO at the time, had a gift for matching talent with needs, but in this case I was certain he was way off base when he encouraged me to accept the position.

As an ever-expanding organization, we went through the 1980s always hard-pressed for funds. We spent money as fast as it came in—the times called for it—because we were growing exponentially. My time tending the financial spigot was a bit more brutal than usual, and we were facing a larger-than-usual deficit at year-end.

Back then, our board was quite large—more than 150 members—and board meetings were democratic free-for-alls at best. Shouting at speakers with bad news and starting boisterous arguments occurred on more than one occasion. Red ink meant that the leadership could expect a lot of dissension during the financial reporting portion of the agenda. I was not looking forward to my time before the board.

Dick suggested that I prepare a memo as a means to soften the inevitable assault we all knew was coming.



J. Richard Wilson

In response to his request, I penned my best explanation and kept it to a single page. I toiled and sweated over every word.

The memo was distributed when I went before the board. The board read it. I asked for questions—and nothing happened. Not a word. Not a question. As I beat a hasty path away from the lectern, I was met by a smiling Dick Wilson. “You’ve missed your calling,” he said. “You should be a writer!”

Dick’s talent scouting paid off.

Much of what the organization has become is due to Dick Wilson’s abilities in matching people with tasks at critical times. He was a genius, and I am so glad to have known him.

Del Staecker

Del Staecker, FRSA, ACFRE, is co-founder of CoreMesagink in Lancaster, Pa.. He joined NSFRE in 1977 and served as board chair in 1990–1991. He wrote the first draft of *A Donor Bill of Rights* and was in the first class of CFREs (1981) and among the first 12 ACFREs. He served on the boards of both the society and the foundation for many years and has served as vice chair for professional development, vice chair for governance and as treasurer of the board, among other positions.

Dick Wilson, the former president of NSFRE, and I met when we both served on the Boy Scout camp staff at Treasure Island Camp, the oldest Scout camp in the country and part of the Philadelphia Council. I think it was in 1949 or 1950. I was a student in the Wharton School at the University of Pennsylvania on the GI Bill after serving in the Navy. I think Dick may have been a couple of years younger. In those days there were a lot of GIs serving on summer camps’ staffs. Dick became the National Conference Chief of the Order of the Arrow and I served as his vice chief. We both served as professional scouts with the Boy Scouts, but our paths didn’t cross again until I did a short stint with the Ketchum Company. While in Pittsburgh with Ketchum, I joined NSFR.

Shortly thereafter I moved to Portland, Ore., and later learned that Dick was president of NSFRE. We began a conversation that resulted in the formation of what is now the Oregon/Southwest Washington Chapter of AFP. Dick visited the new chapter twice

in getting it organized, and I served as the chapter’s first president and as a member of the NSFRE board.

As someone intensely interested in philanthropy, at age 82 I still attend local AFP chapter board meetings as the chapter historian.

Clifford D. Mansley Sr.

Clifford D. (Cliff) Mansley Sr. lives in Lake Oswego, Ore., and joined NSFR in 1962. In 1982 he took the position of director of development for the Cascade Pacific Council, Boy Scouts of America, and remained a member of AFP as an unaffiliated (with a chapter) member until 1984. In 1984 he took the initiative to form what is now the Oregon SW Washington Chapter and served as its president for 2½ years. During that time he also served on the NSFRE board. He has been an on-again off-again member of the board and was made a board member emeritus on Dec. 16, 2009. He completed his chapter’s history in December 2008 and is currently compiling an easy-to-read listing of all the books on fundraising in the Multnomah County Library in Portland.



Many years ago when my husband and I were in New York City, we were looking for something different to do. We happened to come across the notice of a quilting exhibition down on one of the piers in the New York harbor. What a gem! We knew very little about quilting, but this exhibition was enlightening, entertaining, emotionally moving and simply extraordinary!

The first surprise was the magnitude of the exhibit. It seemed the size of at least four football fields. At the exhibit we became impressed with the extraordinary historical depth that is found in the quilts of our pioneers, along with the illustrations of the beautiful patchworks of experiences in the lives of real people. Their stories were illustrated in detail and they came to life through their quilt blocks.

Seeing some of the exceptionally creative work, we were brought to laughter and joy. And just as powerful was the deep sadness upon viewing a quilt made of the suits and clothing of Holocaust victims.

Equally far-reaching was my first exposure to NSFRE. Although it was a conference some 28 years ago, the program content was more than I had ever imagined; the presenters were incredibly impressive and the opportunities to meet colleagues were bountiful.

I have been privileged to serve in many capacities with NSFRE and AFP. I was part of the boards of both the association and the foundation, editor of the first *NSFRE Dictionary of Fund-Raising Terms* and its second edition, now available online, *The AFP Fundraising Dictionary*. Having been in the first class to receive the ACFRE credential, I

was further privileged to serve as the first chair of that board. In 1998 I was especially honored to be named the Outstanding Fundraising Executive at the international conference. Currently I am rounding out my service on the AFP ethics committee.

Each phase of my involvement has brought the mixed emotions and reactions of that quilting exhibit from many years ago. I have been impressed with the growth of this important organization. I have shared with many, learned from my mentors and benefitted in countless instances from my relationships with colleagues who continue to enrich my career to this day. As when viewing the blocks in different quilts, I have come to learn about the intimate details of the lives of so many donors with whom I have had the privilege to share visions and dreams.

Just as I experienced at the quilting exhibit, I have enjoyed laughter and learning. I have made acquaintances with countless fundraising professionals and have enjoyed lifelong friendships with many of them. The bus rides we shared as a board, when we were transported to some interesting place for dinner or a



Donald A. Campbell Jr., CFRE

tour, left lasting shared memories—some fun, some not-so-fun, but it was the sharing that was important.

There have been times when my life has been enriched by enjoying a beautiful tapestry where a stray dark thread is visible. In similar fashion, I am enriched by the sadness of the memories of my mentors who are no longer here to see the remarkable organization they nourished. My memories would not be com-

plete without some of these leaders. I will treasure the memory of Ralph Chamberlain with his wry smile, his unassuming leadership and his love of really good red wine; and the impressive memory of the polished John Miltner, an ever-so-professional and inspired leader. Dick Wilson was the first director of NSFRE who shaped a remarkable organization that has grown to what we enjoy today. And Barbara Marion was the first woman to chair both the society board and later the foundation board. Her quiet, firm leadership was an effective inspiration to us all. Hank Rosso, the founding leader of The Fundraising School, provided training for our young profession at a time when it was not available through any educational venue. Ernie Wood brought practical experience to life in major-gift fundraising, drawing on his lifelong experience with people during his career in the ministry. And finally, there was Tim Burchill, another quiet and highly effective advocate for ethical practice. These are only a few of the exceptional leaders who gave selflessly to the profession and who shaped the practices of so many of us fortunate to have enjoyed their leadership.

One of the fun images that will always hold a special place in my memory is the image of Donald Campbell dancing in his kilt with his special Campbell name tag that grew by the year with pins and ribbons from just about every conference for at least 20 years! I believe it now resides behind glass in the AFP international office. Don continues to be a leader and a lifelong friend.

It's been quite a ride! I continue to learn and to build a base of colleagues who will always be there for support and friendship.

My "quilt" grows larger every year, with brilliant colors and deepening hues. It is an ever-present reminder of the people, the experiences and the satisfaction of learning and serving a profession that has so enriched my life.

Barbara R. Levy

Barbara R. Levy, ACFRE, a consultant in Tucson, Ariz., joined NSFRE in 1981 and became founding president of the Southern Arizona Chapter in 1983. That same year she joined the NSFRE board of directors and served until 1991. She also served on the foundation board in 1988–1997. During that time she served as vice chair for external relations, vice chair for professional advancement and associate dean of the first Executive Leadership Institute. She served on the CFRE board and as first chair of the ACFRE board. She is a member of the AFP ethics committee and has been a frequent presenter at the international conference. In 1998, she received NSFRE's Outstanding Fund Raising Executive award.



Barbara Marion, CFRE

Don Campbell's name tag with pins and ribbons collected over the years



I recall two important aspects of my involvement with NSFR/AFP. The first was after the AFP ethics code task force, headed by Marianne Briscoe and Tim Burchill, completed the work of devising the *Standards of Professional Practice*. I asked Hank Goldstein to head the ethics committee to give leadership to developing guidelines demonstrating acceptable behavior and unacceptable behavior based on the *Standards*. Hank and the committee did an outstanding job accomplishing this task in one year. The only action remaining to complete this precedent-setting code of ethics initiative was the establishment of code enforcement procedures. I asked Robert Pierpont to chair the ethics committee to take on this task. Bob and the ethics committee completed this task in one year, and the completed *AFP Code of Ethical Principles and Standards of Professional Practice*—so far the only code in our profession with an enforcement process—was announced to the nation. We had completed the initiative that, in fact, had provided the impetus for the founding of NSFRE.

In 1992, Chair-Elect John Lore, President Pat Lewis and I went to the National Press Club in Washington, D.C., to hold a news conference announcing the completion of NSFRE's unprecedented new code of ethics with enforcement procedures. We were greeted by an audience of about seven people, and after our presentation the lone reporter in attendance raised his hand to ask a question. I recognized him and his question was, "So what?" After the initial shock, I asked him to explain what he meant. He said that since the code would apply only to society (NSFRE) members, its effect would be negligible. After some mumbling, we collaborated on what I thought was a pretty good response: Although the code would apply only to NSFRE members, for the first time in the fundraising community and profession there was a standard that could be used to evaluate all fundraisers. Furthermore, even though we might not be empowered to call practice into question, reporters like him and the general public could do that using our code. He was satisfied with that response, and I dare say that most of the good that the code does today is caught up in that reality.

The second was the 1986 Chicago conference, aptly focused on "Ready or Not ... Here Comes the Future," which saw the birth of the movement toward racial inclusiveness in NSFRE. Dorothy Darby, president of Blacks In Development (BID) in Chicago, invited Richard Wilson, then president of NSFRE; Barbara Marion, the society's first

female chair; and a large contingent of African-American fundraisers to a meeting where a commitment was made to form the NSFRE Minority Affairs Committee, which Dorothy was appointed to chair. This committee and its many dedicated members brought the society out of the dark ages and played a major role in my becoming the first African-American chair of NSFRE. I am eternally grateful for their commitment and service and for paving the way for me to serve the profession I love in a way that I never dreamed would ever be possible. I hope I did justice to the faith they vested in me.

Charles R. Stephens

Charles R. Stephens, senior consultant with Skystone Ryan Inc. in Atlanta, joined NSFR in May 1967 and has held many positions. He served as board chair in 1992–1993, was a member of the executive committee, served as national board secretary (two terms) and was an at-large member of the national board. He was a volunteer in the professional advancement division and helped create the Mentoring Assistance Program (MAP). He was vice chair for external affairs and chair of the committee on public service. He led the development of the FRIENDS Program (Fund Raising In Economically Needful Directions), an initiative of Marshall Monroe's chairmanship designed to focus association members on public service. He was chair of both the budget committee and the nominating committee (three years), as well as a member of the CFRE board, the ethics committee and the governance task force. He was a faculty

member for the Survey Course and a frequent presenter at national and international conferences. In 2003 he received the Henry A. Rosso Medal for lifetime achievement in ethical fundraising.



Charles R. Stephens



Patricia F. Lewis, ACFRE



Robert Pierpont

I stumbled into the fundraising profession nearly 25 years ago with no experience and, like many of my contemporaries, an indisputable need for plenty of on-the-job training. Throughout the years there has been a small group of special people who have helped to mold me into the professional I am proud to be today: John Hill, Jim Alston, Bobbi Gutman, Anne Curry, Patrick O’heffernan, Johnetta Cole, Charles Stephens and Wayne Clough. However, the person who has most influenced my career is the vice president for development at Georgia Tech, Barrett H. Carson. Since day one of my job 13 years ago, Barrett has always steered me in the right direction. He has given me enough room to grow, but never enough rope to hang myself. He encouraged and supported (with real dollars) my direct involvement in the establishment of the African American Development Officers (AADO) network at Georgia Tech, which has positively affected the lives of more than 500 minority development professionals during its 10-year history. He’s a good person, a passionate leader and a great supervisor. He has challenged me, questioned me, taught me, guided me, cautioned me and forgiven me, but never reduced me to tears—except when I wrote these words about him.

Birgit Smith Burton

Birgit Smith Burton, senior director of foundation relations at the Georgia Institute of Technology in Atlanta, became a member of NSFRE in 1989.



I recall the first AFP international conference I ever attended. The year was 1996 and the conference was in Dallas, Texas. The plenary speaker was former first lady Barbara Bush. I did not know a soul there, since I was the only person from my organization attending this meeting and I was not yet a member of my local chapter. I remember feeling overwhelmed by the number of, as well as the diversity of, the folks attending (not to mention the gargantuan hotel, The Hilton Anatole). There were people from around the world in attendance—Africa, Israel and Asia, to name just a few.

I thought I would feel lost, but instead I felt a sense of comfort being around my colleagues. I met so many smart and interesting people, some of whom I still know. I remember feeling so incredibly impressed with the educational sessions and the presenters. It was a first-class experience and I learned so much about fundraising and about myself. As a result of attending the 1996 conference, I made the decision that I wanted to devote my professional career to learning all I could about fundraising and being the best professional I could be. I also made the decision to join my local chapter.

The feelings I felt at that time are still valid today. Although I no longer feel overwhelmed by the sheer volumes of people who

attend the annual conference, I still feel that sense of pride and belonging when I’m in the presence of my fellow AFP members. I am still committed to learning all I can about fundraising and being the best professional I can be. I believe in service at the local and national levels. I also believe in helping those who are new (and not so new) to this profession to become great fundraisers and stewards of philanthropy. I believe in the power, the relevance and the past, present and future of AFP.

Joyce M. Mitchell-Antoine

Joyce M. Mitchell-Antoine, CFRE, is chief development officer with Planned Parenthood of Central North Carolina in Chapel Hill. She joined NSFRE in 1999 and currently serves as an at-large member of the AFP board. She is also on the nonprofit organizational membership task force, and in 2009 she served on the CFRE task force and as co-chair of the Leadership Academy task force. She was also vice chair of the membership services division in 2008 and previously served on many other committees and task forces. At the chapter level, she is currently on the board of the AFP Triangle Chapter (she also served on the board in 2000–2004) and was NPD co-chair in 2002 and 2009.

first became acquainted with NSFRE in the mid-1970s through Hank Rosso, founder of The Fundraising School and a strong proponent of continuing professional development. At that time, he had been contracted to provide the workshops for the annual conference, which he did for several years.

However, it was the *Code of Ethical Principles* that really attracted me to NSFRE. Thus, one of my most meaningful memories of my time as president and CEO was the codification of the prohibition against percentage fundraising and the development of an enforcement process. There were many meetings of NSFRE leadership with members and with government and legal officials determining viability and risk. These were courageous steps for NSFRE to take at that time. Although there were many codes of ethics, there were few professional associations that had enforcement procedures that put real meaning behind them. Thus our code and membership in NSFRE really stood for ethical professional fundraising—as we professed and taught.

Along with the *Code of Ethical Principles* came *A Donor Bill of Rights*. The initial thinking for this now ubiquitous document came from Del Staecker while he served as chair of NSFRE. However, the final document resulted from a very rewarding collaboration among NSFRE, the Association for Healthcare Philanthropy (AHP), the Council for the Advancement and Support of Education (CASE) and the American Association of Fund Raising Counsel (AAFRC). This process took many months. First, the CEOs of each organization agreed to a draft document; then each of the boards of directors gave feedback and finally all four agreed to a single document.



A Donor Bill of Rights

There are so many memories. There were some funny times, such as the strategic planning committee's backyard barbecue at my house that got rained out and forced us under the cover of our carport—pretty crowded and wet! Others were more serious, such as sharing fundraising practices through The World Fundraising Council, developing our own international outreach, implementing the new volunteer delegate and smaller board structure (having earlier chaired the committee that developed this plan), our fantastic international conferences, the creation of the ACFRE ... and the list goes on. All involved extraordinary

and dedicated volunteers and staff working toward the same goal—advancing philanthropy through principled and ethical fundraising. These were busy, exciting and challenging years, as have been all the 50 years of NSFR/AFP.

Patricia F. Lewis Finnell

Patricia F. Lewis Finnell, ACFRE, joined NSFRE in 1978 and received her CFRE in 1983. In 1985 she helped form the Washington Chapter and was elected its first president. At that time she also became a member of the NSFRE board. She served on the executive committee in 1986–1987 and as chair of the personnel committee. She was assistant treasurer in 1987 and then served as treasurer in 1988–1989. In 1990, she was chair-elect and served as the chair of the task force on governance re-organization. In 1991 she became president and CEO of NSFRE and served until 1998. She now lives in Arizona.

Sy Syms, founder of the Syms Clothing chain, says, “An educated consumer is our best customer.” If you look at the *AFP Code of Ethical Principles and Standards* and you look across our best practices handed down from one generation of fundraisers to another, you will find a constant emphasis on open, fair and honest dialogue with funders. Over the past 20-plus years, perhaps the biggest change I have observed is that more and more there is a real exchange of ideas, questions, data and opinions between donors and fundraisers. What I think this means is that, thanks to a prior generation of AFP leaders who took time to think about what the RIGHT way is to fundraise, philanthropy is evolving to a new, more sophisticated and very exciting place.

John W. Hicks

John W. Hicks, CFRE, president and CEO of J. C. Geever Inc. in New York City, joined NSFRE in 1990. He has served as chair of the chapter administration task force and chair of the 50th anniversary chapter work group, and is a member of the 50th anniversary task force. He is president of the AFP Greater New York Chapter and also has served on the board (1998–1999 and 2001–present), on the development committee, as vice president of professional advancement and as secretary. He also has served in numerous positions for Fund Raising Day in New York.

AFP was created to move fundraising from an avocation to a true profession. In 1960, fundraising was not considered a profession, and our four founders understood that the three pillars of any profession are 1) a code of ethics, 2) curriculum and 3) credentials. Our founders' first act was to develop a set of standards that formed the basis of our current *Code of Ethical Principles and Standards*. Fast forward to 2010 and, thanks to our founders' wisdom and the hard work of many fundraising professionals, we have all three pillars and fundraising is a widely recognized profession.

The AFP ethics education program and the code remain our key priorities today, with a set of 25 standards and an ethics committee that constantly reviews the code to ensure it remains relevant to the practice.

What I love about ethics so much is that it's not some abstract principle, but rather a set of values and standards that we use every day. It's no surprise that one of my most popular presentations is a workshop on ethics that highlights typical ethical dilemmas and encourages dialogue and interaction with participants. And one of the most rewarding aspects of my job as president and CEO is being able to help fundraisers educate their board members about issues such as percentage-based compensation, donor intent or conflict of interest. Every time we can get a board to understand these issues, or help resolve an ethical dispute or dilemma, we take one step toward a more ethical practice of fundraising and philanthropy.

One of my proudest achievements took four years of hard work by people around the world. It began at the first International Fundraising Summit instigated by AFP and held in Toronto in 2003. At the fourth International Fundraising Summit held in The Netherlands in 2006, 24 countries ratified the *International Statement of Ethical Principles in Fundraising*. Today, 30 nations have signed the statement, which is used in Europe, Singapore, Hong Kong, Canada, Mexico and the United States.

Ethical issues are something we address all the time. Ethics is real, and it's truly the foundation of our profession and of AFP. As we celebrate our 50th anniversary, I'm grateful for

AFP Code of Ethical Principles and Standards



ETHICAL PRINCIPLES • Adopted 1964; amended Sept. 2007

The Association of Fundraising Professionals (AFP) exists to foster the development and growth of fundraising professionals and to promote high ethical behavior in the fundraising profession and to generate and enhance philanthropy and volunteerism. Members of AFP are motivated by an inner drive to improve the quality of life through the causes they serve. They serve the ideal of philanthropy, are committed to the preservation and enhancement of volunteerism, and hold stewardship of these concepts as the overriding direction of their professional life. They recognize their responsibility to ensure that needed resources are vigorously and ethically sought and that the intent of the donor is honestly fulfilled. To these ends, AFP members, both individual and business, endorse certain values that they strive to uphold in performing their responsibilities for generating philanthropic support. AFP business members strive to promote and protect the work and mission of their client organizations.

AFP members both individual and business aspire to:

- practice their profession with integrity, honesty, credibility and adherence to the absolute obligation to safeguard the public trust
- act according to the highest goals and means of their organizations, professions, clients and conscience
- put philanthropic mission above personal gain
- inspire others through their own sense of dedication and high purpose
- improve their professional knowledge and skills, so that their performance will benefit their clients
- demonstrate concern for the interest and well-being of individuals affected by their actions
- value the privacy, freedom of choice and interests of all those affected by their actions
- foster cultural diversity and pluralistic values and treat all people with dignity and respect
- affirm, through personal giving, a commitment to philanthropy and to risk in society
- adhere to the spirit as well as the letter of all applicable laws and regulations
- advocate within their organizations adherence to all applicable laws and regulations
- avoid even the appearance of any criminal offense or professional misconduct
- bring credit to the fundraising profession by their professional conduct
- encourage colleagues to embrace and practice these ethical principles and standards
- be aware of the codes of ethics promulgated by other professional organizations that serve philanthropy

ETHICAL STANDARDS

Furthermore, while striving to act according to the above values, AFP members, both individual and business, agree to abide (and to ensure, to the best of their ability, that all members of their staff abide) by the AFP standards. Violation of the standards may subject the member to disciplinary sanctions, including expulsion, as provided in the AFP Ethics Enforcement Procedures.

MEMBER OBLIGATIONS

1. Members shall not engage in activities that harm the member's organizations, clients or professions.
2. Members shall not engage in activities that conflict with their fiduciary, ethical and legal obligations to their organizations, clients or professions.
3. Members shall effectively disclose all potential and actual conflicts of interest, such as disclosure that one provides or seeks ethical input from a volunteer, client or employee for the benefit of the members or the member's organizations.
4. Members shall comply with all applicable local, state, provincial and federal civil and criminal laws.
5. Members shall ensure their individual backgrounds of competence and, on their own and with others, that their professional experience and qualifications will represent their achievement accurately and without exaggeration.
6. Members shall present and supply products and/or services honestly and without misrepresentation and will clearly identify the details of those products, such as availability of the products and/or services and other factors that may affect the suitability of the products and/or services for donors, clients or nonprofit organizations.
7. Members shall conduct the manner and purpose of any commercial relationship as the manner and will be representative and available to organizations and their existing organizations before, during and after any use of materials and/or services. Members will comply with all the and reasonable obligations created by the contract.

8. Members shall refrain from knowingly infringing the intellectual property rights of other parties at all times. Members shall address and notify any trademark infringement that may occur.
10. Members shall protect the confidentiality of all privileged information relating to the provider/client relationship.
11. Members shall refrain from any activity designed to disparage competitors unethically.

SOLICITATION AND USE OF PHILANTHROPIC FUNDS

12. Members shall take care to ensure that all solicitation and communication materials are accurate and correctly reflect their organizations' mission and use of solicited funds.
13. Members shall take care to ensure that donors receive informed, accurate and ethical advice about the value and tax implications of contributions.
14. Members shall take care to ensure that contributions are used to accomplish with donors' intentions.
15. Members shall take care to ensure proper stewardship of all revenue sources, including timely reporting on the use and management of such funds.
16. Members shall obtain explicit consent by donors before sharing the conditions of financial transactions.

PRESENTATION OF INFORMATION

17. Members shall not disclose privileged or confidential information to unauthorized parties.
18. Members shall adhere to the principle that all donor and prospect information created by, or on behalf of, an organization is a client's property of that organization or client and shall not be transferred or utilized except on behalf of that organization or client.
19. Members shall give donors and clients the opportunity to have their names removed from lists that are sold to, mailed to or exchanged with other organizations.
20. Members shall, when raising fundraising funds, use accurate and consistent accounting methods that conform to the accounting guidelines adopted by the American Institute of Certified Public Accountants (AICPA) for the type of organization involved. ¹ In countries outside of the United States, comparable authority should be utilized.

COMPENSATION AND CONTRACTS

21. Members shall not accept compensation or enter into a contract that is based on a percentage of contributions, nor shall members accept funds' fees or contingent fees. Business members must refrain from receiving compensation from third parties derived from products or services for a client without disclosing that third party compensation to the client (for example, volume rebates from vendors to business members).
22. Members may accept performance-based compensation, such as bonuses, provided such bonuses are in accord with prevailing practices within the member's own organizations and are not based on a percentage of contributions.
23. Members shall neither offer nor accept payments or special considerations for the purpose of influencing the selection of products or services.
24. Members shall not pay finder's fees, commissions or percentage compensation based on contributions, and shall take care to discourage their organizations from making such payments.
25. Any member receiving funds on behalf of a donor or client must meet the legal requirements for the disbursement of those funds. Any interest or income earned on the funds should be fully disclosed.

AFP Code of Ethical Principles and Standards

our founders' vision, the dedication of each member to our ethical code and to the work of our chapters in promoting the highest ethical standards. Together we have built the founders' vision into a truly dynamic profession.

Paulette V. Maehara

Paulette V. Maehara, CFRE, CAE, has been president and CEO of the Association of Fundraising Professionals (AFP) since 1998. Previously she served as CEO of the Epilepsy Foundation and also has held executive positions with Project HOPE, the American Red Cross, the March of Dimes Birth Defects Foundation (Hawaii Chapter) and the University of Hawaii Foundation. She has been selected by *The NonProfit Times* as one of the Top 50 Most Influential People in Philanthropy for the last 10 years (1999–2009), and she was one of just 100 women chosen to participate in the 2000 Leadership America Program.

I have so many memories of fantastic events over the years, but one of the most poignant was when we decided to have the AFP board meeting in Mexico City to strengthen our goal of international development and growth. Our Mexican colleagues and our staff did a marvelous job of supporting the meetings.

One of our events was a reception at the U.S. ambassador's residence. While there, I was introduced to a wonderful AFP member from Oaxaca. She spoke very little English and some of our other members translated. She had ridden a bus for four hours to Mexico City to attend the reception and present us a gift. Her present was in appreciation for our board coming to Mexico and presenting an AFP Chapter Library to our Mexican colleagues. After the reception, she then had to ride another bus for four hours to get back home. I relayed this story the next morning to our board, but could barely get the words out without choking up telling it.



Back then we had some members who were unable or unwilling to understand why we needed to commit resources for international growth. For me, this one brief interaction with a very grateful member from Oaxaca said it all!

Steve W. Batson

Steve W. Batson, CFRE, Ed.D., is senior vice president of Cargill Associates in Albany, Ga., and joined NSFRE in 1988. He served on the board in 1995–2004, during which time he was chair-elect (1999–2000), board chair (2001–2002) and immediate past chair and chair of the Committee on Directorship (2003–2004). He also served as chair of the governance task force in 2005–2006. Previously he was vice chair of the professional advancement division (1997–1998) and chair of the education curriculum committee of the professional advancement division (1996–1997). In addition, he has served on the education advisory council (1995–1997) and the membership services division (1993–1995). On the chapter level, he was president of the West Virginia Chapter (1993–1994) and served on the award committee of the Greater Atlanta Chapter (2004).

In 2003, a retired, wealthy businessman, who had been the owner of DHL International in Hong Kong, organized an event at a local charity. At that gathering I heard about the Association of Fundraising Professionals and what it does, but it seemed rather mysterious. For me, fundraising is more of a passion than a learned set of skills—more about making a spontaneous gift than dealing with professional regulations. However, an AFP member who was at the event talked more with me, and this triggered my curiosity about how to raise funds professionally.



Then Paulette Maehara, the current president and CEO of AFP, traveled to Hong Kong and visited the Hong Kong Council of Social Service (HKCSS). I met her on that occasion and we talked. As luck would have it, HKCSS later organized a local Hong Kong delegation to attend the AFP conference in Seattle and I was one of the participants.

The first AFP conference I attended really opened my eyes and my heart. Two other delegates from Hong Kong and I were so impressed by the many exhibitors and educational sessions. I gathered so many reference books, brochures and handouts that they filled my two suitcases—plus a third suitcase I had to buy to hold all of the stuff I had collected at the conference!

After returning to Hong Kong, a group of fundraising friends, including Terry Farris, and I set up the first AFP chapter in Hong Kong. I was elected as the first chapter president and I worked wholeheartedly to recruit more members. We were able to create greater awareness of AFP by organizing the Flag Day Workshop for NGOs in Hong Kong. More than 100 representatives from Hong Kong NGOs joined the workshop and greatly appreciated AFP's help in making the Flag Day campaign a success.

Being a long-term member of AFP, I am delighted to be a part of this large family and to be able to help other fundraisers in Hong Kong. I'd like to take this opportunity to extend my warmest congratulations to AFP on its 50th anniversary!

Timothy Ma Kam Wah

Timothy Ma Kam Wah is executive director of the Senior Citizen Home Safety Association in Hong Kong and an AFP member since 2003. He will present a session on using television as an effective direct-response fundraising media at the AFP International Conference on Fundraising in Baltimore in April 2010.

At the first Hemispheric Congress on Fundraising, held in February 2005 in Mexico City, we celebrated our great profession in Latin America and how far it had come. It was a historic event—one that could not have occurred even just 10 years earlier. It underscored just how fast our profession had grown and come together.

While we came from different countries with different cultures and backgrounds, we were a community, united by the profession we had chosen. We all faced similar challenges in our jobs every day. The way we advanced and grew was through a community, and that is why we all were there—to advance and celebrate the fundraising community.



Adalberto Viesca-Sada, CFRE

At the same time, all of us needed to step back for a moment and remember that this event would not have been possible without the work of a gentleman who unfortunately was not with us. Adalberto Viesca-Sada was one of the leaders in fundraising and philanthropy in Mexico. The vice president of institutional advancement for the University of Monterrey, he was the first fundraiser in Mexico to achieve the Certified Fund Raising Executive (CFRE) credential and

he conducted one of the first capital campaigns in Mexico. He was a member of the board of the Association of Fundraising Professionals (AFP). He traveled the world teaching about fundraising and was beloved by his colleagues.

Adalberto passed away suddenly, leaving behind a wife and three sons. He was serving as chair of the congress at the time, working diligently to put the event together. I thus became chair at a very critical and emotional time. After all, I had some very big shoes to fill.

At the congress, we gathered 450 people from eight different countries.

One of our priorities in developing the congress was to make it accessible and affordable to as many in the fundraising community as possible. The AFP Foundation for Philanthropy took a leadership role in making this happen by giving away numerous scholarships for the congress. For the congress, the foundation granted more than \$18,000—enough for 64 scholarships—to individuals so that they could attend the event. The foundation received an anonymous unrestricted \$15,000 gift given in honor of Paulette Maehara's leadership and her vision to advance the



First Hemispheric Congress on Fundraising—Latin America



First Hemispheric Congress on Fundraising—Latin America

profession internationally, and that gift was used to help with scholarships. There were other members and organizations that also generously gave to the foundation to support scholarships.

In addition, the foundation established the Adalberto Viesca-Sada Scholarship Fund to honor his love of learning, teaching and mentoring. This fund provides scholarships for Latin American fundraising professionals to take advantage of such educational offerings as the Hemispheric Congress, the AFP International Conference on Fundraising and the Faculty Training Academy.

Adalberto wrote a poem titled "What I Am and What I Believe" (translated here in English):

I believe curiosity has to be greater than fear.

I believe in our incurable calling to happiness.

I believe life is much too important to take too seriously.

I believe life is much too short to worry about how long it will last.

I want to live the present time as though there is no future; I want to find the essence of my past in my future.

I acknowledge the lessons from past stumbles and displeasures, but I prefer the misshape of success and joy.

I cry with no shame and I laugh heartily.

I crave eternal life.

I look for my own happiness in the joy of others.

I believe that I exist in what I give to others.

I am creative, enthusiastic and inquisitive; I have better questions than answers.

I always search for an unconventional angle to things.

I learned from my parents to be polite, to always say please and thank you and to ask for forgiveness if I have hurt anyone.

Along with these simple and basic principles, I develop relationships based on confidence, loyalty and my conviction that people are good.

All of us knew Adalberto very well. We were touched by his friendship, his commitment and his generous spirit. To honor his commitment to the profession, to philanthropy and to the event, we dedicated the first Hemispheric Congress on Fundraising in his memory.

Edith Tovar de Castro

Edith Tovar de Castro lives in Mexico and joined NSFRE in 2000. She graduated from the AFP Faculty Training Academy in 2006 and currently serves on the AFP ethics committee and the 50th anniversary task force.

Celebrating a 50th anniversary is a remarkable accomplishment for any organization or individual!

AFP has helped philanthropy and the fundraising profession in all the countries where it has chapters—in Canada, Mexico, Asia and the United States. With philanthropy and fundraising we have helped societies mature as they deal with giving and working with donors and volunteers. Before AFP (then NSFR/NSFRE), this did not happen. It is indeed significant that in more than 200 chapters worldwide, philanthropy and volunteerism are being celebrated because of what has been accomplished in the past 50 years.

AFP has allowed so many development professionals over the years to have an “ah, ha!” moment when they pick up that little gem or nugget of information that will help them, not only in how they raise money but also in how much they raise. These moments have happened for all of us, usually when we least expect it. They are the little nuggets that serve us so well.

Through the years, the level of sophistication of service to the membership has become the envy of other organizations. It is professional and timely, which has been especially important this year in the current turbulent economy. This goes to the strength of the organization and its many volunteers.

One of our strengths is that we are good disciplinarians among ourselves. We have not yielded to any pressure. Not only do we uphold our *Code of Ethical Principles and Standards*, but we constantly reinforce it.

What will the future bring? The next 50 years will be even better, and the outlook is bright. The development of new chapters will be a challenge. Today we have more than 200 chapters; 50 years from now we will not need 400 chapters, but 600 or 1,000 chapters. Philanthropy and fundraising are global in scope, and the opportunity to work around the world and to become an even more international organization is a certainty. For the first time, in 2011 AFP will have a board chair who is not American, but Canadian.

Terry M. Mercer

Sen. Terry M. Mercer, CFRE, represents the province of Nova Scotia and the Senatorial Division of Northend Halifax. He is currently chair of the Senate Liberal Caucus. Very active in AFP, he has been a member since 1990 and has served in many capacities, including government relations chair. He is past-chair of the AFP Foundation for Philanthropy-Canada and is a founding member of both the AFP Nova Scotia and Ottawa chapters. He currently serves as an at-large member of the AFP board. In addition, he has lectured extensively on modern ethical fundraising techniques. He is a recipient of both the Commemorative Medal for the 125th Anniversary of Canadian Confederation and the Queen's Jubilee Medal.



Parliament buildings,
Ottawa, Ontario, Canada

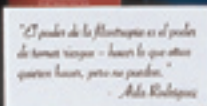
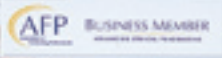
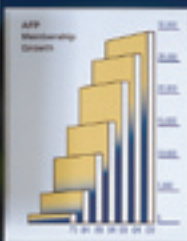
I am among the group of fundraisers who “fell into” this profession, rather than making the

choice to enter it. After a few years as a fundraiser, which I thoroughly enjoyed and where I made connections with new friends and colleagues, I took several months off when my children were quite young. During that time I thought a lot about the change in direction in my career path, from a corporate marketing environment to a nonprofit fundraising environment. Part of my examination of where my future was going to be was whether or not I wanted to continue in this field. I was at a fork in my own road. In the end, I was approached by a hospice organization to do a contract. Two very important things happened simultaneously to cement my direction in fundraising. First, I fell in love with the hospice cause, the people involved and the wonderful opportunity to be a part of it. I experienced that powerful combination of passion and philanthropy, which continues to fill my life to this day. Second, a group of us in Calgary banded together to start what ultimately became our first NSFRE chapter. Through this I made friends around the world, learned more than I ever thought possible and have been given opportunities as a volunteer to be involved in fascinating initiatives and grow my own leadership skills.

Andrea McManus

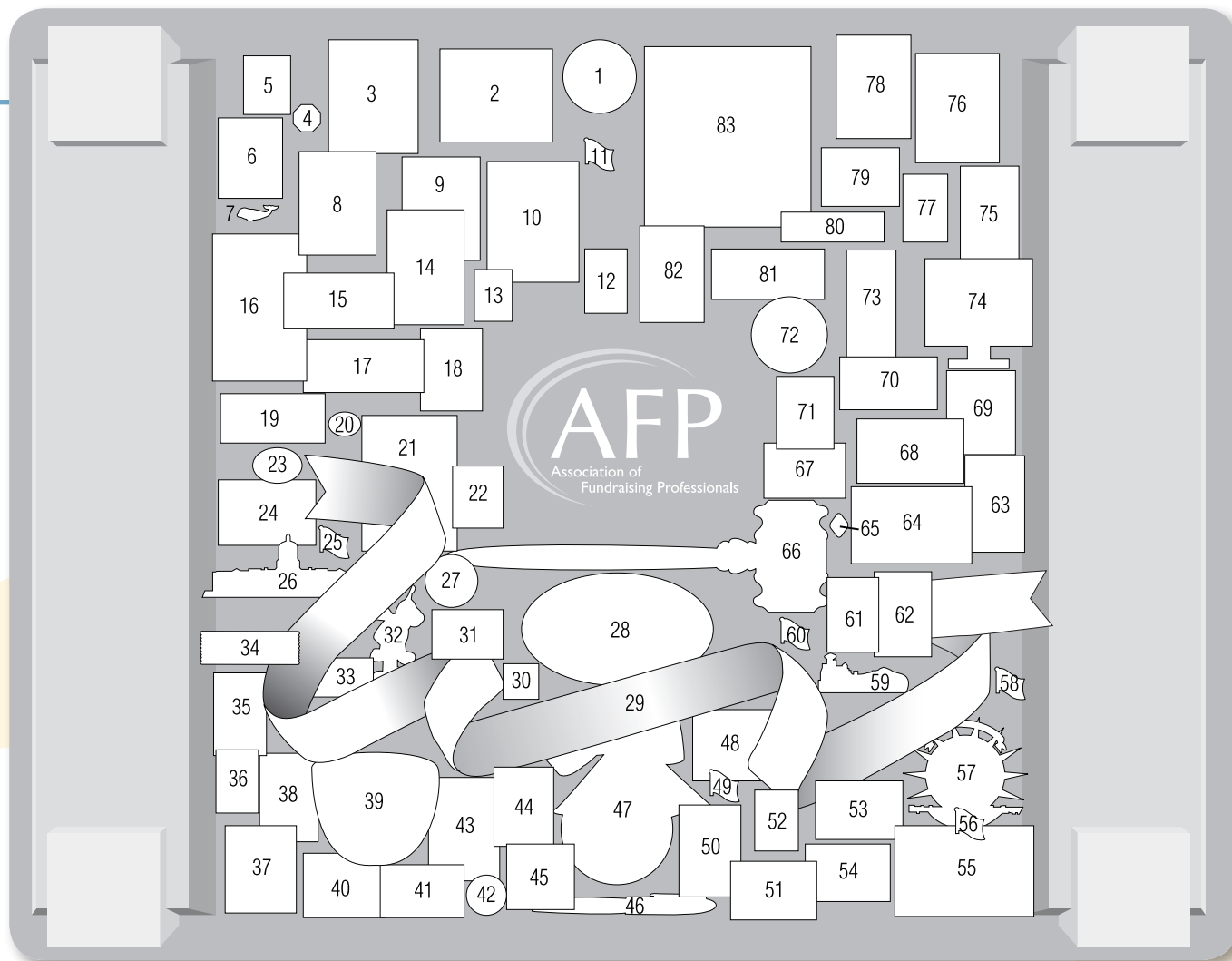
Andrea McManus, CFRE, president of The Development Group in Calgary, Alberta, is AFP's chair-elect and will be the first non-American to serve as board chair. She joined NSFRE in 1996 and soon afterward she helped establish a chapter of the Canadian fundraisers' organization that transitioned into NSFRE. She chaired the Canadian Chapter Presidents Council of NSFRE and was the first Canadian to sit on NSFRE's government relations committee. In 2000, she served as chair of the first board of the newly established Foundation for Philanthropy-Canada. She also has served as vice chair of the external relations division and the professional advancement division.



[illegible][illegible]

AFP

Foundation for Philanthropy
CANADA
Fondation Canadienne pour
la Philanthropie



1. AFP Founders Medallion awarded to individuals who have upheld and advanced the principles of ethical and effective fundraising and worked to foster the development of the profession and the fundraising community throughout their careers
2. Certificate of Incorporation, June 21, 1960
3. *NSFRE Newsletter*, 1980
4. Advanced Certified Fundraising Executive (ACFRE) pin
5. NSFR's first chair, Dr. Abel Hanson
6. *NSFRE Journal*, Fall 1982
7. Pin presented to past board chairs of AFP
8. NSFRE Certification Program brochure
9. *NSFR Newsletter*, 1975
10. *NSFR Newsletter*, Spring 1962
11. There are 167 AFP chapters and 15 collegiate chapters in the United States
12. Paulette V. Maehara, CFRE, CAE, AFP president and CEO, 1998–present
13. J. Richard Wilson, NSFRE president, 1980–1988
14. 1975 NSFR conference appreciation token
15. 1987 NSFRE Southeast Interstate Fund Raising Conference
16. 1986 National Philanthropy Day (NPD) Proclamation signed by President Ronald Reagan
17. NSFRE Foundation 1989 pledge form
18. *NSFRE Journal*, Spring 1987
19. Quote by Helen Keller, American author, political activist and lecturer
20. 2001 AFP foundation bronze donor pin
21. "Now More Than Ever," composed for NPD by Marvin Hamlish, 1986
22. Patricia F. Lewis, ACFRE, NSFRE president, 1991–1998

23. AFP Foundation for Philanthropy–Canada donor pin
24. Canada's Parliament buildings in Ottawa
25. AFP has 15 chapters and one collegiate chapter in Canada
26. The U.S. Capitol, Washington, D.C.
27. NSFRE logo medallion
28. AFP has chapters and strategic alliances around the world
29. AFP's core purpose: To advance ethical and effective fundraising worldwide
30. AFP member pin
31. Quote by Albert Camus, French author, philosopher and journalist
32. AFP "philanthro-bee" representing giving and sharing
33. The Giving & Sharing stamp, issued in 1998, championed by the 1991 Outstanding Fundraiser Milton J. Murray, FAHP
34. AFP Political Action Committee donor-recognition ribbon
35. AFP's *Ready Reference* guide in Spanish
36. Barbara Marion, first female chair of NSFRE, 1984–1985
37. Newly launched *Advancing Philanthropy*, Fall 1993
38. AFP's *Ready Reference* series debuts in 2002
39. NSFRE Jefferson Cup
40. Fundraising and philanthropy in action
41. Fundraising and philanthropy in action
42. Promotional pin for the 2003 AFP conference in Toronto
43. Fundraising and philanthropy in action
44. NPD brochure, 2005
45. 2007 AFP Diversity Art Showcase
46. NSFRE pen
47. Advanced Certified Fundraising Executive (ACFRE) medallion
48. AFP conference educational session
49. The AFP Indonesia, Jakarta Chapter, established in 2005
50. 2007 AFP conference speaker Lance Armstrong
51. Fundraising and philanthropy in action
52. Charles R. Stephens, the first African-American chair of NSFRE, 1992–1993
53. Fundraising and philanthropy in action
54. 2003 AFP Diversity Art Showcase
55. International Congress for Schools and Institutes for Higher Learning, São Paulo, Brazil, 2007
56. There are six AFP chapters in Mexico
57. Ornament representing the 2002 AFP conference in St. Louis
58. The AFP Singapore Chapter, established in 2005
59. Promotional pin for the 2004 AFP conference in Seattle
60. The AFP China, Hong Kong Chapter, established in 2003
61. 2006 AFP conference speaker Gen. Colin Powell
62. *The NSFRE Fund-Raising Dictionary*, 1996
63. Award for Philanthropy
64. AFP/SSIR Nonprofit Management Institute
65. Certified Fund Raising Executive (CFRE) pin
66. NSFRE board gavel
67. Fundraising and philanthropy in action
68. Fundraising and philanthropy in action
69. Redesigned *Advancing Philanthropy*, March/April 2000
70. Quote by Aída Rodríguez, first lady of Mexico, 1932–1934
71. Hemispheric Congress on Fundraising–Latin America
72. AFP Founders Medallion
73. AFP Learning Center
74. Redesigned AFP website, 2009
75. AFP 2007–2010 strategic plan
76. Chart depicting AFP membership growth, 1979–2009
77. Roberta (Robbe) A. Healey, MBA, NHA, ACFRE, AFP chair, 2009–2010
78. Program for the 45th AFP conference, San Diego, 2008
79. Fundraising and philanthropy in action
80. The current *AFP Code of Ethical Principles and Standards* provides for business members, revised 2007
81. Redesigned NPD logo, 2007
82. *Ethical Fundraising* by Janice Gow Pettey, 2008
83. *A Donor Bill of Rights*, developed and adopted in 1993, is endorsed by nine organizations



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